

LATIN AMERICA

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V. LATIN AMERICA

ARGENTINA

BOLIVIA

BRAZIL

CHILE

COLOMBIA

COSTA RICA

DOMINICAN REPUBLIC

ECUADOR

EL SALVADOR

GUATEMALA

MEXICO

PANAMA

PUERTO RICO

URUGUAY

VENEZUELA

2500058441

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: ARGENTINA

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|-------|-------|-------|-------|-------|-------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS) | | | | | | |
| OF WHICH LOCAL MANUFACTURE: | 40.4 | 38.1 | 34.3 | 33.9 | 33.5 | 34.9 |
| POPULATION TOTAL (MILLIONS) | 30.3 | 30.7 | 31.1 | 31.5 | 32.0 | 32.4 |
| PER CAPITA CONSUMPTION | 1,334 | 1,241 | 1,102 | 1,075 | 1,048 | 1,077 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 35 | N/A | 32 | N/A | 30 | N/A |
| % OF FEMALE POPULATION | 29 | N/A | 25 | N/A | 24 | N/A |
| % OF MALE POPULATION | 43 | N/A | 38 | N/A | 35 | N/A |
| COMPANY SHARES % | | | | | | |
| 1) NOBLEZA-PICCARDO (BAT) | 54.8 | 54.5 | 57.2 | 57.3 | 55.9 | 52.5 |
| 2) MASSALIN PARTICULARES (PM/REEMTSMA) | 45.2 | 45.5 | 42.8 | 42.7 | 44.1 | 47.5 |

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LATIN AMERICA 1

| (ARGENTINA) | | | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|------------------------|--------------|-------|-------|-------|-------|-------|-------|
| BRAND FAMILY SHARES % | | | | | | | | |
| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | | | | | | |
| 1) <i>DERBY</i> | BAT | NOB-PIC | -- | -- | 12.1 | 27.0 | 26.3 | 24.3 |
| 2) <i>MARLBORO</i> | PMI | MASS-PART | 9.6 | 10.7 | 8.9 | 10.2 | 12.1 | 17.8 |
| 3) <i>JOCKEY CLUB</i> | BAT | NOB-PIC | 28.9 | 30.4 | 25.8 | 17.6 | 16.9 | 15.9 |
| 4) <i>LE MANS</i> | PMI | MASS-PART | 5.0 | 5.9 | 9.0 | 11.9 | 11.6 | 10.3 |
| 5) <i>43/70</i> | BAT | NOB-PIC | 11.2 | 10.3 | 8.5 | 6.5 | 6.6 | 6.1 |
| 6) <i>L & M</i> | PMI | MASS-PART | 5.9 | 5.5 | 4.0 | 3.4 | 3.0 | 3.3 |
| 7) <i>PHILIP MORRIS</i> | PMI | MASS-PART | 0.6 | 1.7 | 2.4 | 2.1 | 3.6 | 3.2 |
| 8) <i>CHESTERFIELD</i> | PMI | MASS-PART | 9.0 | 7.9 | 5.8 | 3.9 | 3.3 | 3.0 |
| 9) <i>PARISIENNES</i> | BAT | NOB-PIC | 2.9 | 2.7 | 2.5 | 2.6 | 2.6 | 2.7 |
| 10) <i>PARLIAMENT</i> | PMI | MASS-PART | 2.9 | 3.0 | 2.0 | 1.9 | 1.7 | 2.3 |
| 11) <i>IMPARCIALES</i> | PMI | MASS-PART | 3.4 | 3.2 | 2.8 | 2.5 | 2.4 | 2.3 |
| 12) <i>PARTICULARES</i> | PMI | MASS-PART | 2.8 | 2.6 | 2.3 | 2.1 | 2.0 | 1.8 |
| 13) <i>CONWAY</i> | BAT | NOB-PIC | 3.6 | 3.4 | 3.4 | 1.3 | 1.6 | 1.3 |
| 14) <i>COLORADO</i> | PMI | MASS-PART | 3.7 | 3.3 | 2.7 | 1.6 | 1.4 | 1.2 |
| 15) <i>CAMEL</i> | RJR | NOB-PIC | 1.3 | 1.1 | 0.8 | 0.7 | 0.6 | 0.7 |
| 16) <i>PALL MALL</i> | BAT | NOB-PIC | 1.1 | 0.9 | 0.7 | 0.6 | 0.5 | 0.5 |
| 17) <i>COLT</i> | BAT | NOB-NIC | 3.3 | 3.5 | 2.1 | 0.5 | 0.4 | 0.3 |
| OTHERS | | | 4.8 | 3.9 | 4.5 | 3.6 | 3.4 | 3.0 |
| MARKET SEGMENTATION % | | | | | | | | |
| <i>FILTER (NON-MENTHOL)</i> | | | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| <i>FILTER MENTHOL</i> | | | -- | -- | -- | -- | -- | -- |
| <i>NON-FILTER</i> | | | -- | -- | -- | -- | -- | -- |
| PRICE SEGMENTATION % | | | | | | | | |
| PREMIUM | US\$ 1.50 plus | | 10.0 | 9.3 | 6.2 | 6.5 | 6.0 | 7.1 |
| HIGH | US\$ 1.35 to 1.40 | | 22.3 | 21.6 | 16.9 | 14.8 | 15.6 | 21.8 |
| MEDIUM HIGH | US\$ 1.30 | | 8.9 | 7.8 | 7.2 | 6.1 | 5.6 | 5.5 |
| MEDIUM LOW | US\$ 1.25 | | 34.9 | 38.0 | 35.5 | 28.2 | 29.1 | 26.6 |
| LOW | US\$ 1.17 | | 23.9 | 23.3 | 34.2 | 44.4 | 43.7 | 39.0 |
| TAR & NICOTINE SEGMENTATION % | | | | | | | | |
| <i>LOW TAR & LIGHTS</i> | | | 16.6 | 20.0 | 22.8 | 28.0 | 27.7 | 26.2 |
| <i>HIGH/FULL FLAVOR</i> | | | 83.4 | 80.0 | 77.2 | 72.0 | 72.3 | 73.8 |

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| (ARGENTINA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|------|------|------|------|
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLOND: | 78.9 | 80.5 | 83.5 | 86.0 | 86.1 | 87.1 |
| MIXED | 18.1 | 16.8 | 14.1 | 11.8 | 11.9 | 11.1 |
| BLACK | 3.0 | 2.7 | 2.4 | 2.2 | 2.0 | 1.8 |
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 0.3 | 0.2 | 0.1 | --- | -- | -- |
| 80 MM TO 85 MM | 80.0 | 81.5 | 84.0 | 85.2 | 85.8 | 86.4 |
| 100 MM | 19.3 | 18.0 | 15.7 | 14.6 | 14.0 | 13.4 |
| OVER 100 MM | 0.4 | 0.3 | 0.2 | 0.2 | 0.2 | 0.2 |
| PACK COUNT SEGMENTATION % | | | | | | |
| UP TO 10 CIGTS/PACK | 5.6 | 6.7 | 11.9 | 12.2 | 10.3 | 9.1 |
| 20 CIGTS/PACK | 94.4 | 93.3 | 88.1 | 87.8 | 89.7 | 90.9 |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 95.6 | 95.6 | 97.1 | 96.3 | 96.5 | 93.4 |
| FLIP TOP BOX | 4.4 | 4.4 | 2.9 | 3.7 | 3.5 | 6.6 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 1 | 3 | 3 | 3 | 3 | 3 |
| B) RADIO | 1 | 3 | 3 | 3 | 3 | 3 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 2 | 2 | 2 | 2 | 2 | 2 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 3 | 3 | 3 | 3 | 3 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

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LATIN AMERICA 3

| (ARGENTINA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|-------|-------|-------|-------|------|------|
| HEALTH WARNING & T&N LISTINGS | | | | | | |
| ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | | | | | | |
| A) PACKS | NO | YES | YES | YES | YES | YES |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| SPECIFIC T&N NUMBERS ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| TAR BANDS PRINTED ON | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| CONSUMPTION OF OTHER TOBACCO PRODUCTS | | | | | | |
| ROLL YOUR OWN (THOUSAND KILOS) | 2,079 | 2,287 | 3,245 | 3,024 | N/A | N/A |

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LATIN AMERICA 4

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: BOLIVIA

| | | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------------------|---------------------|--------------|--------------|--------------|--------------|--------------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS) | | 0.842 | 0.881 | 0.936 | 1.00 | 0.97 | 1.02 |
| POPULATION TOTAL (MILLIONS) | | 6.5 | 6.7 | 6.7 | 7.1 | 7.1 | N/A |
| PER CAPITA CONSUMPTION | | 129 | 131 | 134 | 142 | 136.0 | N/A |
| COMPANY SHARES | | | | | | | |
| 1) COMPANIA INDUSTRIAL DE TABACOS | | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| 2) BOLIVIA AMERICAN TOBACCO | | -- | -- | -- | -- | -- | -- |
| BRAND FAMILY SHARES % | | | | | | | |
| | TRADEMARK | | | | | | |
| BRAND NAME | OWNERSHIP | MANUFACTURER | | | | | |
| 1) L & M | PMI | CITSA | 47.63 | 46.56 | 47.81 | 48.43 | 52.00 |
| 2) CASINO | CITSA | CITSA | 19.30 | 19.93 | 18.80 | 17.87 | 17.67 |
| 3) ASTORIA | CITSA | CITSA | 15.65 | 17.26 | 17.34 | 16.57 | 16.37 |
| 4) DERBY | CITSA | CITSA | 3.90 | 2.97 | 2.47 | 2.06 | 3.19 |
| 5) BIG BEN | PMI | CITSA | 5.61 | 5.26 | 4.10 | 3.43 | 3.30 |
| 6) COLORADO | PMI | CITSA | 6.73 | 6.86 | 5.45 | 3.65 | 2.74 |
| 7) MARLBORO | PMI | CITSA | 0.82 | 1.10 | 4.00 | 7.71 | 4.58 |
| 8) PACIFIC | CITSA | CITSA | 0.09 | -- | -- | -- | -- |
| 9) DUCAL | CITSA | CITSA | 0.09 | 0.06 | -- | -- | -- |
| 10) CAMBA | CITSA | CITSA | 0.17 | -- | -- | 0.24 | 0.15 |
| 11) OTHERS | | | -- | -- | -- | 0.04 | 0.00 |

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| (BOLIVIA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|-------|-------|-------|-------|-------|-------|
| MARKET SEGMENTATION % | | | | | | |
| FILTER (NON-MENTHOL) | 84.32 | 82.70 | 82.61 | 83.39 | 83.61 | 84.32 |
| NON-FILTER | 15.68 | 17.30 | 17.39 | 16.61 | 16.39 | 15.68 |
| PRICE SEGMENTATION % | | | | | | |
| PREMIUM | 0.9 | 1.1 | 4.0 | 7.71 | 4.58 | 6.31 |
| HIGH | 47.6 | 46.5 | 47.8 | 55.51 | 58.04 | 51.42 |
| MEDIUM | 12.3 | 3.5 | 12.1 | 2.10 | 3.19 | 4.33 |
| LOW | 39.2 | 40.3 | 36.1 | 34.68 | 34.19 | 37.94 |
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| HIGH/FULL FLAVOR | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLOND | 64.79 | 62.75 | 63.84 | 65.32 | 65.80 | 62.06 |
| BLACK | 35.21 | 37.25 | 36.16 | 34.68 | 34.20 | 37.94 |
| PACK COUNT SEGMENTATION % | | | | | | |
| UP TO 10 CIGTS/PACK | -- | -- | -- | -- | -- | -- |
| 20 CIGTS/PACK | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 100.0 | 100.0 | 96.94 | 92.2 | 94.2 | 95.6 |
| FLIP TOP BOX | -- | -- | 3.06 | 7.8 | 5.8 | 4.4 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 1 | 1 | 1 | 1 | 1 | 1 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

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LATIN AMERICA 6

| (BOLIVIA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|------|------|------|------|------|------|
| HEALTH WARNING & T&N LISTINGS ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | | | | | | |
| A) PACKS | YES | YES | YES | YES | YES | YES |
| B) CARTONS | NO | NO | YES | YES | YES | YES |
| C) ADVERTISING | NO | NO | YES | YES | YES | YES |
| SPECIFIC T&N NUMBERS ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| TAR BANDS PRINTED ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

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LATIN AMERICA 7

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: BRAZIL

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|--------------|--------------|--------------|--------------|--------------|--------------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS) | 168.8 | 161.2 | 157.5 | 162.2 | 163.6 | 155.7 |
| POPULATION TOTAL (MILLIONS) | 138.5 | 141.5 | 144.4 | 147.4 | 150.4 | 153.3 |
| PER CAPITA CONSUMPTION | 1,219 | 1,139 | 1,091 | 1,100 | 1,088 | 1,016 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 34.9 | 34.1 | 32.5 | 32.5 | 32.4 | 29.4 |
| % OF FEMALE POPULATION | 28.1 | 27.0 | 26.6 | 27.3 | 27.2 | 26.2 |
| % OF MALE POPULATION | 42.2 | 41.8 | 38.9 | 38.3 | 38.1 | 32.9 |
| COMPANY SHARES | | | | | | |
| 1) BAT | 83.0 | 81.4 | 79.7 | 80.0 | 82.1 | 84.1 |
| 2) PM | 7.8 | 8.3 | 8.0 | 8.1 | 15.2 | 13.8 |
| 3) RJR | 7.9 | 8.2 | 9.5 | 9.2 | -- | -- |
| OTHERS | 1.3 | 2.1 | 2.8 | 2.7 | 2.7 | 2.1 |

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LATIN AMERICA 8

(BRAZIL) 1986 1987 1988 1989 1990 1991

BRAND FAMILY SHARES %

| | | TRADEMARK OWNERSHIP | MANUFACTURER | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|------------------|----------|------------------------|--------------|------|------|------|------|------|------|
| 1) HOLLYWOOD | C.C.S.C. | B.A.T. | | 30.7 | 25.9 | 20.5 | 18.8 | 16.9 | 17.9 |
| 2) BELMONT | C.C.S.C. | B.A.T. | | 17.1 | 18.3 | 19.8 | 19.7 | 18.9 | 16.2 |
| 3) PLAZA | C.C.S.C. | B.A.T. | | 10.7 | 12.3 | 14.0 | 13.4 | 15.3 | 15.5 |
| 4) FREE | C.C.S.C. | B.A.T. | | 3.5 | 5.3 | 6.4 | 7.3 | 9.2 | 11.7 |
| 5) CARLTON | B.A.T. | B.A.T. | | 5.3 | 6.1 | 5.5 | 5.8 | 6.2 | 7.5 |
| 6) CONTINENTAL | C.C.S.C. | B.A.T. | | 4.2 | 3.9 | 3.2 | 2.5 | 2.4 | 2.8 |
| 7) MUSTANG | P.M.B. | P.M.B. | | 4.7 | 5.0 | 4.9 | 4.1 | 3.4 | 2.6 |
| 8) PALACE | P.M.B. | P.M. | | -- | -- | 0.2 | 1.4 | 1.7 | 2.3 |
| 9) MARLBORO | P.M.I. | P.M. | | 1.1 | 1.4 | 1.3 | 1.4 | 1.6 | 2.1 |
| 10) MINISTER | C.C.S.C. | B.A.T. | | 4.0 | 3.4 | 2.6 | 2.2 | 1.8 | 1.7 |
| 11) MISTURA FINA | P.M.I. | P.M. | | 2.0 | 2.4 | 2.3 | 1.8 | 1.5 | 1.3 |
| 12) GALAXY | P.M.I. | P.M. | | 1.7 | 1.6 | 1.2 | 1.0 | 0.9 | 1.0 |
| 13) ELMO | C.C.S.C. | B.A.T. | | 1.4 | 1.0 | 1.1 | 0.9 | 1.1 | 0.5 |
| 14) MONTREAL | C.C.S.C. | B.A.T. | | 1.3 | 1.4 | 1.7 | 1.5 | 1.3 | 0.4 |
| 15) MONTEREY | P.M.B. | P.M. | | 1.0 | 1.0 | 0.8 | 0.5 | 0.4 | 0.3 |
| 16) ARIZONA | C.C.S.C. | B.A.T | | 1.7 | 1.0 | 0.6 | 0.3 | 0.2 | -- |
| OTHERS | | | | 9.6 | 10.0 | 13.9 | 17.4 | 17.2 | 16.2 |

MARKET SEGMENTATION %

| | | | | | | |
|----------------------|------|------|------|------|------|------|
| FILTER (NON-MENTHOL) | 97.4 | 98.2 | 98.2 | 98.5 | 98.5 | 99.0 |
| FILTER MENTHOL | 0.2 | 0.2 | 0.1 | 0.1 | 0.1 | 0.1 |
| NON-FILTER | 2.4 | 1.6 | 1.7 | 1.4 | 1.4 | 0.9 |

PRICE SEGMENTATION %

| | | | | | | |
|--------------|------|------|------|------|------|------|
| PREMIUM (VI) | 1.5 | 1.4 | 1.2 | 1.2 | 1.1 | 1.3 |
| HIGH (IV, V) | 55.7 | 52.5 | 44.8 | 42.8 | 42.4 | 48.1 |
| MEDIUM (III) | 12.4 | 12.8 | 14.0 | 13.6 | 15.1 | 15.1 |
| LOW (II, I) | 30.4 | 33.3 | 40.0 | 42.4 | 41.4 | 35.5 |

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LATIN AMERICA 9

| (BRAZIL) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|-------|-------|-------|-------|-------|-------|
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| ULTRA LOW (0 - 6 mg.) | 0.1 | -- | -- | -- | ---- | |
| LOW (6 - 10 mg.) | 4.1 | 5.6 | 6.4 | 7.2 | 9.5 | 12.7 |
| MEDIUM (10 - 15 mg.) | 59.4 | 54.2 | 49.0 | 49.6 | 50.5 | 36.9 |
| HIGH/FULL FLAVOR (15 mg and over) | 36.4 | 40.2 | 44.6 | 43.2 | 40.0 | 50.4 |
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLOND | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 0.7 | 0.2 | 0.5 | 0.1 | 0.1 | -- |
| 80 MM to 85 MM | 92.0 | 92.2 | 91.0 | 89.1 | 87.9 | 87.9 |
| 90 MM | 0.1 | 0.1 | 0.6 | 0.8 | 0.8 | 0.8 |
| 100 MM | 7.3 | 7.6 | 8.5 | 10.8 | 11.2 | 11.3 |
| OVER 100 MM | -- | -- | -- | -- | -- | -- |
| PACK COUNT SEGMENTATION % | | | | | | |
| 20 CIGTS/PACK | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 91.7 | 90.7 | 90.7 | 88.8 | 88.3 | 87.0 |
| FLIP TOP BOX | 8.3 | 9.3 | 9.3 | 11.2 | 11.7 | 13.0 |
| PRINCESS PACK | -- | -- | -- | -- | -- | -- |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 3 | 3 | 3 | 3 | 3 | 3 |
| B) RADIO | 1 | 1 | 3 | 3 | 3 | 3 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 2 | 2 | 2 | 2 | 3 | 3 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 3 | 3 | 3 | 3 | 3 | 3 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 3 | 3 |

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LATIN AMERICA 10

| (BRAZIL) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|---------|----------|-------|------|------|------|
| HEALTH WARNING & T&N LISTINGS | | | | | | |
| ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | | | | | | |
| A) PACKS | NO | NO | YES | YES | YES | YES |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | YES | YES | YES | YES |
| SPECIFIC T&N NUMBERS ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| TAR BANDS PRINTED ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| CONSUMPTION OF OTHER TOBACCO PRODUCTS | | | | | | |
| CIGARS (MILLIONS) | 177.1 | 180.9 | 184.8 | N/A | N/A | N/A |
| PIPE TOBACCO (THOUSAND KILOS) | 177.6 | 181.4 | 185.3 | N/A | N/A | N/A |
| ROLL YOUR OWN (THOUSAND KILOS) | 7,600.0 | 22,000.0 | N/A | N/A | N/A | N.A |

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LATIN AMERICA 11

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: CHILE

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|------|------|------|------|------|------|
| TOTAL CIGARETTE CONSUMPTION | | | | | | |
| OF WHICH LOCAL MANUFACTURE: (BILLIONS) | 8.5 | 8.8 | 9.4 | 10.0 | 10.3 | 10.4 |
| IMPORTED FROM: 1985 only RJR from Brazil 1.0% per year. | | | | | | |
| POPULATION TOTAL (MILLIONS) | 12.0 | 12.0 | 12.5 | 12.7 | 12.9 | 13.1 |
| PER CAPITA CONSUMPTION | 708 | 733 | 752 | 787 | 798 | 794 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | -- | -- | -- | -- | -- | -- |
| % OF FEMALE POPULATION | -- | -- | -- | -- | -- | -- |
| % OF MALE POPULATION | -- | -- | -- | -- | -- | -- |
| COMPANY SHARES | | | | | | |
| 1) PHILIP MORRIS (MANUF. FACIL) | 3.5 | 3.3 | 3.1 | 2.8 | 2.8 | 2.2 |
| 2) BAT (C.C.T.) | 95.3 | 95.8 | 96.6 | 97.0 | 97.2 | 97.8 |
| 3) RJR (COSUR) | 1.2 | 0.9 | 0.3 | 0.2 | -- | -- |

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LATIN AMERICA 12

(CHILE) 1986 1987 1988 1989 1990 1991

BRAND FAMILY SHARES %

| | TRADEMARK BRAND NAME | OWNERSHIP | MANUFACTURER | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|-----------------|-------------------------|------------|--------------|------|------|------|------|------|------|
| 1)ADVANCE | BAT | C.C.T. | | 21.3 | 24.4 | 23.2 | 21.3 | 20.6 | 20.1 |
| 2)DERBY | BAT | C.C.T. | | 26.4 | 23.2 | 23.5 | 21.8 | 19.5 | 17.9 |
| 3)BELMONT | BAT | C.C.T. | | 9.3 | 9.9 | 9.4 | 9.7 | 12.5 | 14.1 |
| 4)LIFE | BAT | C.C.T. | | 2.9 | 1.7 | 0.9 | 3.8 | 8.4 | 13.8 |
| 5)HILTON | BAT | C.C.T. | | 8.1 | 8.6 | 9.0 | 10.6 | 9.8 | 9.6 |
| 6)VICEROY | BAT | C.C.T. | | 6.8 | 8.3 | 10.1 | 8.3 | 9.2 | 7.2 |
| 7)LUCKY STRIKE | BAT | C.C.T. | | 2.2 | 2.0 | 2.5 | 2.7 | 3.6 | 3.6 |
| 8)RECORD | BAT | C.C.T. | | 7.6 | 6.1 | 8.3 | 7.5 | 4.0 | 3.5 |
| 9)KENT | BAT | C.C.T. | | 3.9 | 5.2 | 5.2 | 4.6 | 4.4 | 3.5 |
| 10)PALL MALL | BAT | C.C.T. | | 1.3 | 2.0 | 1.9 | 3.5 | 3.8 | 3.2 |
| 11)WINDSOR | BAT | C.C.T. | | 1.4 | 1.1 | 1.0 | 1.1 | 1.0 | 0.8 |
| 12)BOND | PM | F.A.C.I.L. | | 1.1 | 0.8 | 0.8 | 0.8 | 0.8 | 0.7 |
| 13)MARLBORO | PM | F.A.C.I.L. | | --- | 0.2 | 0.4 | 0.6 | 0.7 | 0.5 |
| 14)CHESTERFIELD | PM | F.A.C.I.L. | | 0.9 | 0.7 | 0.6 | 0.5 | 0.6 | 0.5 |
| 15)TURBO | FACIL | F.A.C.I.L. | | 0.7 | 1.1 | 0.9 | 0.6 | 0.5 | 0.3 |
| 16)CASSINO | BAT | C.C.T. | | 2.1 | 1.4 | 0.4 | 0.2 | 0.2 | 0.2 |
| OTHERS | | | | 4.0 | 2.3 | 1.9 | 2.4 | 0.4 | 0.5 |

MARKET SEGMENTATION %

| | | | | | | |
|----------------------|------|------|------|------|------|------|
| FILTER (NON-MENTHOL) | 98.3 | 98.7 | 99.0 | 99.0 | 99.3 | 99.2 |
| FILTER MENTHOL | 0.4 | 0.4 | -- | 0.1 | -- | 0.1 |
| NON-FILTER | 1.3 | 0.9 | 1.0 | 0.9 | 0.7 | 0.7 |

PRICE SEGMENTATION %

| | | | | | | |
|--------------------------|-------------|------|------------|------------|-------------|------------|
| PREMIUM (IMPORTED CIGS.) | \$1.05-9.40 | 9.4 | \$1.09-9.5 | \$1.00-4.8 | \$1.28-4.33 | \$1.38-3.8 |
| HIGH | .85-29.0 | 18.7 | .97-7.3 | .81-21.2 | 1.10-21.25 | 1.21-7.34 |
| MEDIUM | .70-11.0 | 25.4 | .84-38.5 | .79-49 | .89-50.50 | 1.07-24.86 |
| MEDIUM/LOW | .56-42.0 | 39.0 | .68-33.4 | .56-7.64 | .68-11.74 | .85-39.24 |
| LOW | .48-9.0 | 7.6 | .50-11.3 | .35-17.3 | .56-12.18 | .59-24.65 |

TOBACCO TYPE SEGMENTATION %

| | | | | | | |
|-----------------|----|----|----|----|----|----|
| BLOND: VIRGINIA | -- | -- | -- | -- | -- | -- |
|-----------------|----|----|----|----|----|----|

PACK TYPE SEGMENTATION %

| | | | | | | |
|--------------|------|------|------|------|------|------|
| SOFT PACK | 97.5 | 97.3 | 96.4 | 96.0 | 93.4 | 94.0 |
| FLIP TOP BOX | 2.5 | 2.7 | 3.6 | 4.0 | 6.6 | 6.0 |

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LATIN AMERICA 13

(CHILE) 1986 1987 1988 1989 1990 1991

CIGARETTE ADVERTISING MEDIA AVAILABILITY

*NOTATIONS: 1) YES
2) BANNED
3) RESTRICTED

| | | | | | | |
|---------------|---|---|---|---|---|---|
| A) TELEVISION | 3 | 3 | 3 | 3 | 3 | 3 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

HEALTH WARNING & T&N LISTINGS

ANSWER EITHER: YES OR NO

| | | | | | | |
|-------------|----------------|-----|-----|-----|-----|-----|
| WARNING ON: | A) PACKS | YES | YES | YES | YES | YES |
| | B) CARTONS | NO | NO | NO | NO | NO |
| | C) ADVERTISING | YES | YES | YES | YES | YES |

SPECIFIC T&N NUMBERS ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

TAR BANDS PRINTED ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

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LATIN AMERICA 14

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: COLOMBIA

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|
| <i>TOTAL CIGARETTE CONSUMPTION (MILLIONS)</i> | <i>19,972</i> | <i>18,100</i> | <i>17,002</i> | <i>16,550</i> | <i>16,500</i> | <i>16,100</i> |
| <i>POPULATION TOTAL (MILLIONS)</i> | <i>28.3</i> | <i>28.9</i> | <i>30.0</i> | <i>30.5</i> | <i>31.0</i> | <i>31.6</i> |
| <i>PER CAPITA CONSUMPTION</i> | <i>706</i> | <i>626</i> | <i>567</i> | <i>543</i> | <i>532</i> | <i>510</i> |
| <i>COMPANY SHARES</i> | | | | | | |
| 1)CIA. COLOMBIANA DE TABACO (COL) | <i>67.5</i> | <i>68.0</i> | <i>68.3</i> | <i>68.8</i> | <i>65.7</i> | <i>63.2</i> |
| 2)PROTABACO S.A. (PRO) | <i>31.5</i> | <i>32.0</i> | <i>31.7</i> | <i>31.2</i> | <i>34.3</i> | <i>36.8</i> |

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LATIN AMERICA 15

(COLOMBIA)

1986 1987 1988 1989 1990 1991

BRAND SHARES %

| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|-------------------|---------------------|--------------|------|------|------|------|------|------|
| 1)ROYAL | COL | COL | 12.6 | 15.4 | 14.8 | 16.5 | 20.1 | 23.6 |
| 2)PRESIDENT | PRO | PRO | 17.6 | 18.3 | 18.2 | 17.0 | 20.5 | 22.2 |
| 3)MUSTANG | PRO | PRO | 17.8 | 13.7 | 13.5 | 14.2 | 13.8 | 14.6 |
| 4)IMPERIAL SP | COL | COL | 15.2 | 13.0 | 15.1 | 16.1 | 14.1 | 12.5 |
| 5)PIELROJA REG | COL | COL | 19.7 | 17.5 | 15.6 | 14.0 | 13.7 | 11.8 |
| 6)DERBY | COL | COL | 15.9 | 13.2 | 13.5 | 12.7 | 12.4 | 11.1 |
| 7)CAMPEON | COL | COL | -- | 1.5 | 0.7 | 2.0 | 2.2 | 2.5 |
| 8)HIDALGOS | COL | COL | 2.7 | 2.9 | 2.3 | 2.3 | 1.2 | 0.8 |
| 9)PIELROJA F. | COL | COL | 5.2 | 2.2 | 1.9 | 2.0 | 0.8 | 0.6 |
| 10)MONTECARLO FIL | PRO | PRO | 1.1 | 1.0 | 0.7 | 0.7 | 0.2 | 0.1 |
| 11)NACIONAL FIL | NAL | COL | 1.1 | 1.3 | 0.9 | 0.5 | 0.4 | 0.0 |

MARKET SEGMENTATION%

| | | | | | | |
|----------------------|------|------|------|------|------|------|
| FILTER (NON-MENTHOL) | 87.7 | 82.5 | 88.4 | 86.0 | 86.3 | 88.2 |
| NON-FILTER | 12.3 | 17.5 | 15.6 | 14.0 | 13.7 | 11.8 |

PRICE SEGMENTATION

| | | | | | | |
|---------------------------|------|------|------|------|------|------|
| PREMIUM (US 0.85 AND UP) | -- | -- | -- | -- | -- | -- |
| HIGH (US 0.55 TO 0.70) | 13.6 | 16.4 | 15.5 | 17.2 | 20.3 | 23.7 |
| MEDIUM (US 0.40 TO 0.50) | 49.7 | 39.9 | 42.1 | 43.0 | 40.3 | 38.2 |
| LOW (US 0.29 TO 0.35) | 23.8 | 26.2 | 25.0 | 23.8 | 25.1 | 26.1 |
| ECONOMY (US 0.20 TO 0.25) | 12.3 | 17.5 | 15.6 | 14.0 | 13.7 | 11.8 |

TAR & NICOTINE SEGMENTATION%

| | | | | | | |
|-------------------------------|------|------|------|------|------|------|
| LOW (BELOW 15MG) | 1.1 | 1.0 | 0.7 | 0.7 | 0.2 | 0.1 |
| HIGH/FULL FLAVOR (ABOVE 15MG) | 98.9 | 99.0 | 99.3 | 99.3 | 99.8 | 99.9 |

*Less than 0.1%

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LATIN AMERICA 16

(COLOMBIA)

1986 1987 1988 1989 1990 1991

TOBACCO TYPE SEGMENTATION %

| | | | | | | |
|--------|------|------|------|------|------|------|
| BLOND: | 63.6 | 56.3 | 57.6 | 60.2 | 60.6 | 61.9 |
| MIXED | 17.6 | 19.8 | 19.9 | 19.0 | 22.7 | 24.6 |
| BLACK | 18.8 | 23.9 | 20.7 | 18.8 | 16.1 | 13.2 |

LENGTH SEGMENTATION %

| | | | | | | |
|-------------------|------|------|------|------|------|------|
| 70 MM AND SHORTER | 19.7 | 17.5 | 15.6 | 14.0 | 13.7 | 11.8 |
| 80 MM TO 85 MM | 87.7 | 82.5 | 84.4 | 86.0 | 86.3 | 88.2 |

PACK COUNT SEGMENTATION %

| | | | | | | |
|---------------------|------|------|------|------|------|------|
| UP TO 10 CIGTS/PACK | 9.3 | 7.6 | 8.4 | 8.0 | 7.9 | 7.7 |
| 16 TO 19 CIGTS/PACK | 12.3 | 12.7 | 11.6 | 14.0 | 13.7 | 11.8 |
| 20 CIGTS/PACK | 71.0 | 71.9 | 76.0 | 78.0 | 78.4 | 80.5 |

PACK TYPE SEGMENTATION %

| | | | | | | |
|--------------|------|------|------|------|------|------|
| SOFT PACK | 86.4 | 83.6 | 84.5 | 82.8 | 79.7 | 76.3 |
| FLIP TOP BOX | 13.6 | 16.4 | 15.5 | 17.2 | 20.3 | 23.7 |

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LATIN AMERICA 17

(COLOMBIA)

1986

1987

1988

1989

1990

1991

CIGARETTE ADVERTISING MEDIA AVAILABILITY

*NOTATIONS: 1) YES
2) BANNED
3) RESTRICTED

| | | | | | | |
|------------------|---|---|---|---|---|---|
| A) TELEVISION | 3 | 3 | 3 | 3 | 3 | 3 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 3 | 3 | 3 | 3 | 3 | 3 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

HEALTH WARNING & T&N LISTINGS

ANSWER EITHER: YES OR NO

| | | | | | | |
|-------------|----------------|-----|-----|-----|-----|-----|
| WARNING ON: | A) PACKS | YES | YES | YES | YES | YES |
| | B) CARTONS | NO | NO | NO | NO | NO |
| | C) ADVERTISING | (1) | (1) | (1) | (1) | (1) |

SPECIFIC T&N NUMBERS ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

TAR BAND PRINTED ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

(1) WARNING ON T.V. ADVERTISING ONLY.

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LATIN AMERICA 18

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: COSTA RICA

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|------|------|------|------|
| TOTAL CIGARETTE CONSUMPTION (BILLIONS) | 2.2 | 2.3 | 2.1 | 2.0 | 2.1 | 2.0 |
| POPULATION TOTAL (MILLIONS) | 2.7 | 2.7 | 2.8 | 2.9 | 3.0 | 3.2 |
| PER CAPITA CONSUMPTION | 815 | 821 | 757 | 696 | 703 | 634 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 22.6 | -- | -- | 20.1 | -- | 21.6 |
| % OF FEMALE POPULATION | 10.1 | -- | -- | 10.2 | -- | 10.9 |
| % OF MALE POPULATION | 33.2 | -- | -- | 29.5 | -- | 30.6 |
| COMPANY SHARES | | | | | | |
| 1) REPUBLIC TOBACCO CO. | 72.9 | 72.5 | 72.5 | 72.5 | 71.7 | 70.2 |
| 2) TABACALERA COSTARRICENSE, S.A. | 27.1 | 27.5 | 27.5 | 27.5 | 28.3 | 29.8 |

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LATIN AMERICA 19

(COSTA RICA)

1986 1987 1988 1989 1990 1991

BRAND FAMILY SHARES %

| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|----------------|---------------------|--------------|------|------|------|------|------|------|
| 1)DELTA | B.A.T. | R.T.CO. | 50.1 | 50.7 | 51.1 | 53.7 | 54.5 | 54.1 |
| 2)DERBY | B.A.T. | T.C.S.A. | 19.1 | 20.6 | 20.9 | 21.6 | 22.5 | 23.9 |
| 3)TICOS | B.A.T. | R.T.CO. | 8.0 | 7.1 | 6.4 | 5.7 | 5.9 | 5.6 |
| 4)MARLBORO | P.M. | T.C.S.A. | 2.8 | 3.1 | 3.3 | 3.6 | 4.2 | 4.6 |
| 5)REX | B.A.T. | R.T.CO. | 4.6 | 4.5 | 4.1 | 3.9 | 3.8 | 3.3 |
| 6)CAPRI | B.A.T. | R.T.CO. | 4.8 | 4.3 | 3.8 | 3.4 | 3.0 | 2.7 |
| 7)EMU | B.A.T. | R.T.CO. | 0.4 | 1.6 | 2.3 | 1.8 | 1.5 | 1.3 |
| 8)LUCKY STRIKE | B.A.T. | R.T.CO. | -- | -- | -- | -- | 0.8 | 1.2 |
| 9)KOOL | B.A.T. | R.T.CO. | 0.5 | 0.5 | 0.6 | 0.5 | 0.6 | 0.7 |
| 10)VICEROY | B.A.T. | R.T.CO. | 0.9 | 0.9 | 0.8 | 0.7 | 0.6 | 0.6 |
| 11)TEMPO | B.A.T. | R.T.CO. | -- | -- | -- | 0.7 | 0.4 | 0.4 |
| 12)MONTEREY | B.A.T. | T.C.S.A. | 0.9 | 0.8 | 0.6 | 0.5 | 0.4 | 0.4 |
| 13)BELMONT | B.A.T. | R.T.CO. | 0.7 | 0.6 | 0.5 | 0.4 | 0.3 | 0.3 |
| 14)SAVOY | B.A.T. | T.C.S.A. | 0.4 | 0.3 | 0.2 | 0.2 | 0.2 | 0.2 |
| 15)WEST | REEMSTMA | T.C.S.A. | 1.1 | 0.6 | 0.4 | 0.2 | 0.2 | 0.1 |
| 16)ROYAL | B.A.T. | T.C.S.A. | 0.4 | 0.3 | 0.3 | 0.2 | 0.1 | 0.1 |
| 17)FORTUNA | B.A.T. | T.C.S.A. | 0.3 | 0.2 | 0.1 | 0.1 | 0.1 | 0.0 |
| 18)HILTON | B.A.T. | T.C.S.A. | -- | -- | 0.5 | 0.3 | 0.1 | 0.0 |
| 19)OTHERS | | | 4.0 | 2.9 | 2.4 | 1.8 | 0.8 | 0.6 |

MARKET SEGMENTATION %

| | | | | | | |
|----------------------|------|------|------|------|------|------|
| FILTER (NON-MENTHOL) | 97.1 | 97.3 | 96.7 | 96.7 | 97.2 | 97.1 |
| FILTER MENTHOL | 1.4 | 1.4 | 2.2 | 2.3 | 2.0 | 2.2 |
| NON-FILTER | 1.5 | 1.3 | 1.1 | 1.0 | 0.8 | 0.7 |

PRICE SEGMENTATION %

| | | | | | | |
|-----------|------|------|------|------|------|------|
| PREMIUM A | 4.1 | -- | -- | -- | -- | -- |
| PREMIUM B | 6.3 | 10.2 | 9.7 | 9.4 | 9.6 | 9.6 |
| HIGH | 24.7 | 26.6 | 28.0 | 27.5 | 28.2 | 29.3 |
| MEDIUM A | 54.0 | 53.7 | 53.9 | 55.7 | 55.8 | 55.1 |
| MEDIUM B | 9.0 | 8.2 | 7.3 | 6.4 | 5.6 | 5.3 |
| LOW | 1.9 | 1.3 | 1.1 | 1.0 | 0.8 | 0.8 |

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LATIN AMERICA 20

| (COSTA RICA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|-------|-------|-------|-------|-------|-------|
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLACK | | | | | | |
| BLOND | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| MIXED | | | | | | |
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 1.5 | 1.3 | 1.1 | 1.0 | 0.8 | 0.7 |
| 80 MM TO 85 MM | 98.5 | 98.7 | 98.1 | 98.3 | 98.8 | 99.0 |
| 95 MM | -- | -- | -- | -- | 0.4 | 0.4 |
| PACK COUNT SEGMENTATION % | | | | | | |
| 20 CIGTS/PACK | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 76.4 | 75.0 | 73.8 | 73.2 | 71.4 | 68.0 |
| FLIP TOP BOX | 23.6 | 25.0 | 26.2 | 26.8 | 28.6 | 32.0 |
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| FULL FLAVOR | 97.2 | 97.0 | 96.5 | 96.4 | 96.3 | 95.6 |
| LOW | 2.8 | 3.0 | 3.5 | 3.6 | 3.7 | 4.4 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 3 | 3 | 3 | 3 | 3 | 3 |
| B) RADIO | 3 | 3 | 3 | 3 | 3 | 3 |
| C) NEWSPAPERS | 1 | 3 | 3 | 3 | 3 | 3 |
| D) MAGAZINES | -- | 3 | 3 | 3 | 3 | 3 |
| E) COUPONS | -- | 2 | 2 | 2 | 2 | 2 |
| F) POINT OF SALE | -- | 3 | 3 | 3 | 3 | 3 |
| G) BILLBOARDS | -- | 3 | 3 | 3 | 3 | 3 |
| H) CINEMA | 3 | 3 | 3 | 3 | 3 | 3 |
| I) SAMPLING | 1 | 3 | 3 | 3 | 3 | 3 |

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LATIN AMERICA 21

| (COSTA RICA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|-------------|-------------|-------------|-------------|-------------|-------------|
| HEALTH WARNING & T&N LISTINGS | | | | | | |
| ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | | | | | | |
| A) PACKS | YES | YES | YES | YES | YES | YES |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| SPECIFIC T&N NUMBERS ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| TAR BAND PRINTED ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

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LATIN AMERICA 22

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: DOMINICAN REPUBLIC

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|-----------|--------------|-------|-------|-------|------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | 4,057 | 4,466 | 4,462 | 4,570 | 4,405 | 4349 |
| POPULATION TOTAL (MILLIONS) | 6.1 | 6.2 | 6.4 | 6.5 | 6.6 | 6.7 |
| PER CAPITA CONSUMPTION | 665 | 720 | 697 | 703 | 667 | 649 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 18.7 | 18.2 | 18.0 | 18.0 | 18.0 | 17.9 |
| % OF FEMALE POPULATION | 19.4 | 19.3 | 19.0 | 19.1 | 19.0 | 18.9 |
| % OF MALE POPULATION | 18.9 | 18.7 | 18.5 | 18.4 | 18.4 | 18.3 |
| COMPANY SHARES | | | | | | |
| 1) E. LEON JIMENES, C. POR A. (PM) | 64.2 | 65.1 | 69.9 | 70.7 | 73.1 | 74.2 |
| 2) COMPAÑIA ANONIMA TABACALERA | 35.8 | 34.9 | 30.1 | 29.3 | 26.9 | 25.8 |
| BRAND FAMILY SHARES % | | | | | | |
| | TRADEMARK | | | | | |
| BRAND NAME | OWNERSHIP | MANUFACTURER | | | | |
| 1) MARLBORO | PM | ELJ | 44.4 | 45.1 | 49.3 | 51.1 |
| 2) NACIONAL | ELJ | ELJ | 17.1 | 16.6 | 18.3 | 19.6 |
| 3) MONTECARLO | CAT | CAT | 26.1 | 26.4 | 22.2 | 19.1 |
| 4) CREMAS | CAT | CAT | 4.1 | 3.0 | 2.7 | 3.5 |
| 5) CASINO | CAT | CAT | 2.4 | 2.0 | 2.0 | 1.6 |

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LATIN AMERICA 23

| <i>(DOMINICAN REPUBLIC)</i> | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|------|------|-------|-------|------|-------|
| <i>MARKET SEGMENTATION</i> | | | | | | |
| <i>FILTER (NON-MENTHOL)</i> | 89.4 | 89.2 | 90.8 | 90.0 | 90.2 | 89.8 |
| <i>FILTER MENTHOL</i> | 5.0 | 5.7 | 6.5 | 6.5 | 7.2 | 7.5 |
| <i>NON-FILTER</i> | 5.6 | 5.1 | 2.7 | 3.5 | 2.6 | 2.7 |
| <i>PRICE SEGMENTATION</i> | | | | | | |
| <i>HIGH US\$0.90 12/82</i> | 72.4 | 74.8 | 75.0 | 73.8 | 69.8 | 65.7 |
| <i>MEDIUM 0.70 12/82</i> | 17.3 | 16.9 | 18.3 | 20.2 | 26.0 | 29.8 |
| <i>LOW 0.40 12/82</i> | 10.3 | 8.3 | 6.7 | 6.0 | 4.2 | 4.5 |
| <i>TAR & NICOTINE SEGMENTATION</i> | | | | | | |
| <i>LOW</i> | 4.9 | 6.0 | 6.5 | 7.1 | 7.1 | 6.9 |
| <i>HIGH/FULL FLAVOR</i> | 95.1 | 94.0 | 93.5 | 92.9 | 92.9 | 93.1 |
| <i>TOBACCO TYPE SEGMENTATION</i> | | | | | | |
| <i>BLOND (AMERICAN)</i> | 89.7 | 91.7 | 93.3 | 94.0 | 95.8 | 95.5 |
| <i>BLACK</i> | 10.3 | 8.3 | 6.7 | 6.0 | 4.2 | 4.5 |
| <i>LENGTH SEGMENTATION</i> | | | | | | |
| <i>70 MM AND SHORTER</i> | 0.1 | 0.1 | -- | -- | 0.1 | -- |
| <i>80 MM TO 85 MM</i> | 99.9 | 99.9 | 100.0 | 100.0 | 99.9 | 100.0 |
| <i>PACK COUNT SEGMENTATION</i> | | | | | | |
| <i>UP TO 10 CIGTS/PACK</i> | 75.7 | 76.0 | 74.5 | 76.0 | 76.0 | 76.5 |
| <i>20 CIGTS/PACK</i> | 24.3 | 24.0 | 25.5 | 24.0 | 24.0 | 23.5 |
| <i>PACK TYPE SEGMENTATION</i> | | | | | | |
| <i>SOFT PACK</i> | 86.9 | 87.0 | 86.3 | 85.5 | 85.5 | 86.6 |
| <i>FLIP TOP BOX</i> | 13.1 | 13.0 | 13.7 | 14.5 | 14.5 | 13.4 |

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(DOMINICAN REPUBLIC)

1986 1987 1988 1989 1990 1991

CIGARETTE ADVERTISING MEDIA AVAILABILITY

*NOTATIONS: 1) YES
2) BANNED
3) RESTRICTED

| | | | | | | |
|------------------|---|---|---|---|---|---|
| A) TELEVISION | 1 | 1 | 1 | 1 | 1 | 1 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 2 | 2 | 2 | 2 | 2 | 2 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

HEALTH WARNING & T&N LISTINGS

ANSWER EITHER: YES OR NO

| | | | | | | |
|-------------|----------------|----|----|----|----|----|
| WARNING ON: | A) PACKS | NO | NO | NO | NO | NO |
| | B) CARTONS | NO | NO | NO | NO | NO |
| | C) ADVERTISING | NO | NO | NO | NO | NO |

SPECIFIC T&N NUMBERS ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

TAR BANDS PRINTED ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

2500058466

LATIN AMERICA 25

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: ECUADOR

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|------|------|------|------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | 3786 | 3604 | 3076 | 3069 | 3045 | 2949 |
| OF WHICH LOCAL MANUFACTURE: | 100% | 100% | 100% | 100% | 100% | 100% |
| POPULATION TOTAL (MILLIONS)* | 9.7 | 9.9 | 10.2 | 10.5 | 10.8 | 11.1 |
| PER CAPITA CONSUMPTION | 392 | 363 | 302 | 292 | 282 | 265 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 35.2 | 34.1 | 34.0 | 33.1 | 33.1 | 32.4 |
| % OF FEMALE POPULATION | 17.7 | 17.2 | 17.3 | 12.0 | 12.0 | 13.0 |
| % OF MALE POPULATION | 50.0 | 51.5 | 51.9 | 55.5 | 55.5 | 52.0 |
| COMPANY SHARES | | | | | | |
| 1) PROESA | 78.9 | 80.9 | 81.3 | 80.1 | 79.5 | 79.5 |
| 2) EL PROGRESO | 21.1 | 19.1 | 18.7 | 19.9 | 20.5 | 20.5 |

*Ref: MARKOP

2500058467

LATIN AMERICA 26

(ECUADOR)

1986 1987 1988 1989 1990 1991

BRAND FAMILY SHARES %

| | | TRADEMARK OWNERSHIP | MANUFACTURER | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|-----|--------------|------------------------|--------------|------|------|------|------|------|------|
| 1) | LARK | PMI | TANASA | 37.2 | 39.1 | 40.1 | 36.1 | 35.4 | 34.6 |
| 2) | LIDER | PMI | TANASA | 27.8 | 30.1 | 29.0 | 31.3 | 31.8 | 32.4 |
| 3) | FULL SPEED | EL PROG. | EL PROGRESO | 12.7 | 11.8 | 13.1 | 15.9 | 17.3 | 17.7 |
| 4) | MARLBORO | PMI | TANASA | 9.3 | 8.9 | 10.4 | 9.2 | 9.3 | 9.8 |
| 5) | SUPERIOR | PMI | TANASA | 1.5 | 0.8 | 0.6 | 3.0 | 2.7 | 2.4 |
| 6) | KING | EL PROG. | EL PROGRESO | 1.6 | 1.5 | 1.5 | 1.1 | 1.1 | 1.1 |
| 7) | DORAL | EL PROG. | EL PROGRESO | 6.0 | 4.4 | 2.9 | 2.1 | 1.2 | 0.8 |
| 8) | CHESTERFIELD | PMI | TANASA | 0.9 | 0.9 | 0.5 | 0.5 | 0.4 | 0.4 |
| 9) | SALEM | RJR | EL PROGRESO | 0.6 | 0.7 | 0.9 | 0.8 | 0.8 | 0.3 |
| 10) | TEMPO | EL PROG. | EL PROGRESO | -- | 0.7 | 0.4 | -- | -- | -- |
| 11) | WEST | REEMTSMA | TANASA | 0.7 | 0.7 | 0.3 | -- | -- | -- |
| 12) | BARONET | PMI | TANASA | 1.0 | 0.5 | 0.3 | -- | -- | -- |
| 13) | MAPLETON | PMI | TANASA | 0.4 | 0.1 | 0.0 | -- | -- | -- |
| | OTHERS | | | 0.3 | 0.1 | 0.04 | -- | -- | 0.5 |

MARKET SEGMENTATION %

| | | | | | | | |
|----------------------|---------|------|------|------|------|------|------|
| FILTER (NON-MENTHOL) | REGULAR | 14.5 | 12.6 | 13.9 | 14.7 | 15.7 | 16.2 |
| FILTER MENTHOL | | 0.9 | 0.9 | 0.9 | 1.7 | 0.8 | 0.8 |
| NON-FILTER | | 13.0 | 12.0 | 12.8 | 14.2 | 15.2 | 20.1 |
| FILTER CHARCOAL | | 71.6 | 74.5 | 72.4 | 70.4 | 68.4 | 62.9 |

PRICE SEGMENTATION % OFFICIAL RATE FREE RATE

| | | | | | | | | |
|---------------|--------|------|------|------|------|------|------|------|
| PREMIUM | 0.69 | 0.49 | 48.5 | 49.8 | 52.0 | 46.6 | 45.9 | 45.0 |
| HIGH | 0.64 | 0.45 | 33.9 | 35.2 | 32.3 | 33.4 | 33.0 | 33.8 |
| MEDIUM | 0.59 | 0.41 | 2.4 | 1.2 | 0.8 | -- | -- | -- |
| LOW | 0.46 | 0.32 | 1.1 | 1.2 | 1.2 | 1.1 | 1.1 | 1.1 |
| ECONOMY | 0.22 | 0.18 | 14.1 | 12.6 | 13.7 | 18.9 | 20.0 | 20.1 |
| OFFICIAL RATE | 449.00 | | | | | | | |
| FREE RATE | 525.00 | | | | | | | |

TAR & NICOTINE SEGMENTATION %

| | | | | | | |
|------------------|------|------|------|------|------|------|
| MEDIUM | 36.3 | 37.6 | 35.0 | 36.2 | 36.2 | 37.2 |
| HIGH/FULL FLAVOR | 63.7 | 62.4 | 65.0 | 63.8 | 63.8 | 62.8 |

TOBACCO TYPE SEGMENTATION %

| | | | | | | |
|-----------------|------|------|------|------|------|------|
| BLOND: AMERICAN | 85.9 | 87.4 | 86.3 | 81.1 | 80.0 | 79.9 |
| BLACK | 14.1 | 12.6 | 13.7 | 18.9 | 20.0 | 20.1 |

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LATIN AMERICA 27

| (ECUADOR) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|-------|------|------|------|
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 13.0 | 12.0 | 12.2 | 13.1 | 15.2 | 15.1 |
| 80 MM to 85 MM | 87.0 | 88.0 | 87.8 | 86.9 | 84.8 | 84.9 |
| PACK COUNT SEGMENTATION % | | | | | | |
| 10 CIGTS/PACK | 3.4 | 3.5 | 3.6 | 2.5 | 3.3 | 3.9 |
| 20 CIGTS/PACK | 96.4 | 96.5 | 96.4 | 97.5 | 96.7 | 96.1 |
| 18 CIGTS/PACK | 0.2 | -- | -- | -- | -- | -- |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 20.2 | 17.5 | 16.94 | 14.4 | 18.4 | 19.0 |
| FLIP TOP BOX | 79.8 | 82.5 | 83.06 | 85.6 | 81.6 | 81.0 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 3 | 3 | 3 | 3 | 3 | 3 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 3 | 3 | 3 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |
| HEALTH WARNING & T&N LISTINGS | | | | | | |
| ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: A) PACKS | YES | YES | YES | YES | YES | YES |
| B) CARTONS | YES | YES | YES | YES | YES | YES |
| C) ADVERTISING (PRINTED) | YES | YES | YES | YES | YES | YES |
| SPECIFIC T&N NUMBERS ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING (PRINTED) | YES | YES | YES | YES | YES | YES |

2500058469

LATIN AMERICA 28

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: EL SALVADOR

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|--------------|--------------|--------------|--------------|--------------|-------------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | 1,893 | 1,930 | 1,876 | 1,407 | 1,559 | 1426 |
| POPULATION TOTAL (MILLIONS) | 4.8 | 4.9 | 5.2 | 5.3 | 5.3 | 5.4 |
| PER CAPITA CONSUMPTION | 394 | 394 | 361 | 265 | 296 | 264 |
| SMOKER INCIDENCE | | | | | | |
| % of TOTAL POPULATION | 22.0 | 20.2 | 22.4 | 20.5 | 20.4 | 19.4 |
| % OF FEMALE POPULATION | 4.8 | 3.9 | 5.6 | 4.7 | 4.9 | 2.4 |
| % of MALE POPULATION | 37.5 | 35.2 | 37.8 | 36.5 | 35.9 | 36.3 |
| COMPANY SHARES | | | | | | |
| 1)CIGARRERIA MORAZAN, S.A. DE C.V. (BAT) | 82.4 | 75.1 | 78.4 | 73.7 | 74.5 | 72.3 |
| 2)TABACALERA DE EL SALVADOR, S.A. DE C.V. (PM) | 17.6 | 20.9 | 21.6 | 26.3 | 25.5 | 27.7 |

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LATIN AMERICA 29

| (EL SALVADOR) | | | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|---------------------|--------------|------|------|------|------|------|------|
| BRAND FAMILY SHARES % | | | | | | | | |
| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | | | | | | |
| 1)DELTA | B.A.T | MORAZAN | 58.9 | 57.8 | 57.4 | 57.3 | 58.6 | 57.6 |
| 2)DIPLOMAT | P.M.I. | TASASA | 8.3 | 10.8 | 12.3 | 15.6 | 14.8 | 17.1 |
| 3)CASINO | B.A.T. | MORAZAN | 13.1 | 10.6 | 10.0 | 8.3 | 7.2 | 6.8 |
| 4)MARLBORO | P.M.I. | TASASA | 4.8 | 4.9 | 4.8 | 6.0 | 6.0 | 6.1 |
| 5)BARONET | P.M.I. | TASASA | 3.8 | 4.5 | 4.0 | 3.7 | 2.5 | 2.3 |
| 6)REX | B.A.T. | MORAZAN | 4.1 | 4.0 | 3.9 | 2.8 | 2.5 | 2.1 |
| 7)YORK | B.A.T. | MORAZAN | 1.1 | 1.9 | 3.6 | 2.7 | 1.8 | 1.8 |
| 8)L&M KS | P.M.I. | TASASA | -- | -- | -- | -- | 0.4 | 1.7 |
| 9)IMPERIAL | B.A.T. | MORAZAN | -- | -- | -- | -- | 1.9 | 1.2 |
| 10)WINDSOR | B.A.T. | MORAZAN | 2.3 | 2.3 | 2.0 | 1.5 | 1.3 | 1.2 |
| 11)LUCKY STRIKE | B.A.T. | -- | -- | -- | -- | -- | -- | 0.8 |
| 12)MASTER | P.M.I. | TASASA | -- | -- | -- | -- | 1.2 | 0.5 |
| 13)VICEROY | B.A.T. | MORAZAN | 0.7 | 0.7 | 0.5 | 0.5 | 0.5 | 0.4 |
| 14)KOOL | B.A.T. | MORAZAN | -- | -- | -- | -- | 0.3 | 0.2 |
| 15)POLAR | B.A.T. | MORAZAN | 1.7 | 1.4 | 0.8 | 0.4 | 0.3 | 0.2 |
| 16)LIDER | P.M.I. | TASASA | -- | -- | -- | 0.8 | 0.5 | 0.0 |
| 17)CARIBE | P.M.I. | TASASA | 0.4 | 0.3 | 0.3 | 0.3 | 0.1 | 0.0 |
| 18)FIESTA | B.A.T. | MORAZAN | 0.2 | 0.1 | 0.1 | 0.1 | 0.1 | 0.0 |
| MARKET SEGMENTATION% | | | | | | | | |
| FILTER (NON-MENTHOL) | | | 94.8 | 92.6 | 91.8 | 90.6 | 91.3 | 90.4 |
| FILTER MENTHOL | | | 5.1 | 7.3 | 7.9 | 9.4 | 8.7 | 9.6 |
| NON-FILTER | | | 0.1 | 0.1 | 0.0 | 0.0 | 0.0 | 0.0 |
| TAR & NICOTINE SEGMENTATION% | | | | | | | | |
| HIGH/FULL FLAVOR | | | 95.2 | 95.4 | 96.1 | 96.2 | 96.8 | 97.0 |
| TOBACCO TYPE SEGMENTATION % | | | | | | | | |
| BLOND: AMERICAN | | | 100 | 100 | 100 | 100 | 100 | 100 |

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LATIN AMERICA 30

| (EL SALVADOR) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|-------------|-------------|-------------|-------------|-------------|-------------|
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 0.5 | 0.4 | 0.4 | 0.4 | 0.2 | 0.0 |
| 80 MM TO 85 MM | 89.6 | 86.3 | 83.0 | 74.8 | 76.5 | 73.1 |
| 100 MM | 9.9 | 13.3 | 16.6 | 24.8 | 23.8 | 26.9 |
| PACK COUNT SEGMENTATION % | | | | | | |
| 20 CIGTS/PACK | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 95.8 | 95.5 | 95.8 | 94.5 | 93.5 | 91.5 |
| FLIP TOP BOX | 4.2 | 4.5 | 4.2 | 5.5 | 6.5 | 8.5 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 1 | 1 | 1 | 1 | 1 | 1 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

2500058472

| (EL SALVADOR) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|------|------|------|------|------|------|
| HEALTH WARNING & T&N LISTINGS | | | | | | |
| ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | | | | | | |
| A) PACKS | YES | YES | YES | YES | YES | YES |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| SPECIFIC T&N NUMBERS ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| TAR BAND PRINTED ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

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LATIN AMERICA 32

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: GUATEMALA

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|--------------|--------------|--------------|--------------|--------------|--------------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | 1,804 | 1,998 | 1,933 | 1,927 | 1,804 | 1,778 |
| POPULATION TOTAL (MILLIONS) | 8.3 | 9.4 | 9.2 | 9.3 | 9.4 | 9.5 |
| PER CAPITA CONSUMPTION | 217 | 213 | 210 | 207 | 192 | 187 |
| COMPANY SHARES | | | | | | |
| 1) TACASA (PMI) | 45.1 | 48.7 | 51.1 | 49.8 | 51.6 | 52.9 |
| 2) TNSA (BAT) | 54.9 | 51.3 | 48.9 | 50.2 | 48.4 | 47.1 |

BRAND FAMILY SHARES %

| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|-------------|---------------------|--------------|------|------|------|------|------|------|
| 1) RUBIOS | PMI | TACASA | 39.5 | 41.4 | 43.0 | 41.2 | 43.1 | 46.5 |
| 2) CASINO | BAT | TNSA | 18.8 | 17.4 | 16.1 | 17.9 | 17.0 | 17.0 |
| 3) BELMONT | BAT | TNSA | 18.0 | 18.9 | 20.3 | 20.4 | 15.6 | 11.8 |
| 4) MONTANA | BAT | TNSA | -- | -- | -- | -- | -- | 9.9 |
| 5) MARLBORO | PMI | TACASA | 2.3 | 2.8 | 3.2 | 3.6 | 3.4 | 3.9 |
| 6) IMPERIAL | BAT | TNSA | -- | -- | -- | 1.2 | 7.9 | 3.2 |
| 7) PAYASOS | BAT | TNSA | 2.8 | 2.4 | 2.1 | 2.1 | 2.1 | 2.1 |
| 8) DIPLOMAT | PMI | TACASA | 1.3 | 1.4 | 1.8 | 1.9 | 1.5 | 1.4 |
| 9) RECORD | BAT | TNSA | 5.2 | 4.2 | 3.5 | 3.1 | 2.3 | 1.0 |
| 10) HILTON | BAT | TNSA | 6.0 | 5.0 | 3.9 | 3.3 | 2.1 | 1.0 |
| 11) DERBY | PMI | TACASA | -- | -- | 3.1 | 2.7 | 2.0 | 1.0 |
| 12) VICEROY | BAT | TNSA | 0.6 | 0.5 | 0.5 | 0.5 | 0.3 | 0.3 |
| 13) PLAZA | BAT | TNSA | 2.1 | 1.6 | 1.4 | 1.1 | 0.6 | 0.3 |
| 14) WEST | REEMTSMA | TACASA | -- | -- | -- | -- | -- | -- |
| 15) VICTOR | BAT | TNSA | 0.1 | -- | -- | -- | -- | -- |
| 16) CLUB | PMI | TACASA | -- | -- | -- | 0.4 | -- | -- |
| 17) ALAS | BAT | TNSA | 0.3 | 0.3 | 0.2 | 0.2 | -- | -- |
| OTHERS | BAT | | 3.0 | 4.1 | 0.9 | 0.8 | 2.1 | 0.6 |

MARKET SEGMENTATION %

| | | | | | | |
|-----------------------------|-------------|-------------|-------------|-------------|-------------|-------------|
| FILTER (NON-MENTHOL) | 88.5 | 88.0 | 86.7 | 84.9 | 87.0 | 86.4 |
| FILTER MENTHOL | 8.7 | 9.6 | 11.2 | 13.0 | 10.9 | 11.5 |
| NON-FILTER | 2.8 | 2.4 | 2.1 | 2.1 | 2.1 | 2.1 |

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LATIN AMERICA 33

| (GUATEMALA) | | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|--------|------|------|------|------|------|------|
| PRICE SEGMENTATION % * | | | | | | | |
| HIGH | \$0.90 | 2.8 | 3.3 | 3.8 | 4.1 | 3.7 | 4.2 |
| MED-HIGH | 0.68 | 24.2 | 23.2 | 24.3 | 24.4 | 18.1 | 13.8 |
| MEDIUM | 0.59 | 56.8 | 57.7 | 58.6 | 59.9 | 67.9 | 72.8 |
| MED-LOW | 0.48 | 13.4 | 13.4 | 11.2 | 9.5 | 8.2 | 7.1 |
| LOW | 0.36 | 2.8 | 2.4 | 2.1 | 2.1 | 2.1 | 2.1 |
| TAR & NICOTINE SEGMENTATION % | | | | | | | |
| LOW | | 2.3 | 2.5 | 2.8 | 3.2 | 2.6 | 3.3 |
| HIGH/FULL FLAVOR | | 97.7 | 97.5 | 97.2 | 96.8 | 97.4 | 96.7 |
| TOBACCO TYPE SEGMENTATION % | | | | | | | |
| BLACK | | 2.8 | 2.4 | 2.1 | 2.1 | 2.1 | 2.1 |
| BLOND | | 97.2 | 97.6 | 97.9 | 97.9 | 97.9 | 97.9 |
| LENGTH SEGMENTATION % | | | | | | | |
| 70 MM AND SHORTER | | 16.4 | 16.0 | 13.5 | 11.7 | 10.4 | 9.3 |
| 80 MM to 85 MM | | 76.3 | 74.9 | 77.8 | 80.4 | 84.0 | 87.3 |
| 90 MM TO 99 MM | | 6.0 | 7.7 | 6.9 | 6.0 | 4.1 | 2.1 |
| OVER 100 MM | | 1.3 | 1.4 | 1.8 | 1.9 | 1.5 | 1.3 |
| PACK COUNT SEGMENTATION % | | | | | | | |
| 20 CIGTS/PACK | | 100% | 100% | 100% | 100% | 95.1 | 82.1 |
| 10 CIGTS/PACK | | -- | -- | -- | -- | 4.9 | 17.9 |
| PACK TYPE SEGMENTATION % | | | | | | | |
| SOFT PACK | | 96.5 | 96.3 | 94.5 | 94.7 | 95.4 | 95.2 |
| FLIP TOP BOX | | 3.5 | 3.7 | 5.5 | 5.3 | 4.6 | 4.8 |

*PRICE PER 20'S PACK IN U.S. DOLLARS.

2500058475

(GUATEMALA)

1986 1987 1988 1989 1990 1991

CIGARETTE ADVERTISING MEDIA AVAILABILITY

*NOTATIONS: 1) YES
2) BANNED
3) RESTRICTED

| | | | | | | |
|------------------|---|---|---|---|---|---|
| A) TELEVISION | 1 | 1 | 1 | 1 | 1 | 1 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

HEALTH WARNING & T&N LISTINGS

ANSWER EITHER: YES OR NO

| | | | | | | |
|-------------|----------------|-----|-----|-----|-----|-----|
| WARNING ON: | A) PACKS | YES | YES | YES | YES | YES |
| | B) CARTONS | NO | NO | NO | NO | NO |
| | C) ADVERTISING | NO | NO | NO | NO | NO |

SPECIFIC T&N NUMBERS ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

TAR BANDS PRINTED ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

2500058476

LATIN AMERICA 35

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: MEXICO

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|-------|-------|-------|-------|-------|-------|
| TOTAL CIGARETTE CONSUMPTION(BILLIONS) | 46.3 | 50.6 | 46.4 | 51.3 | 52.5 | 51.6 |
| OF WHICH LOCAL MANUFACTURE: | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| POPULATION TOTAL (MILLIONS) | 80.0 | 81.9 | 83.3 | 84.6 | 81.2 | 82.1 |
| PER CAPITA CONSUMPTION | 579 | 618 | 557 | 606 | 646 | 629 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION (16%) | 34.5 | 38.0 | 36.9 | 35.6 | 36.2 | 32.9 |
| % OF FEMALE POPULATION | 10.0 | 11.0 | 11.0 | 11.0 | 11.0 | 10.0 |
| % OF MALE POPULATION | 27.0 | 31.0 | 31.0 | 29.0 | 30.0 | 28.0 |
| COMPANY SHARES | | | | | | |
| 1) MODERNA | 60.9 | 60.1 | 59.6 | 59.1 | 58.0 | 57.2 |
| 2) CIGATAM | 39.1 | 39.9 | 40.4 | 40.9 | 42.0 | 42.8 |

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LATIN AMERICA 36

(MEXICO)

1986 1987 1988 1989 1990 1991

BRAND FAMILY SHARES %

| | | TRADEMARK | | | | | | |
|-------------------|-----------|--------------|------|------|------|------|------|------|
| BRAND NAME | OWNERSHIP | MANUFACTURER | | | | | | |
| 1) MARLBORO | PM | CIGATAM | 16.5 | 14.7 | 16.0 | 20.5 | 24.7 | 26.6 |
| 2) RALEIGH | MODERNA | MODERNA | 24.2 | 21.4 | 21.1 | 23.0 | 24.7 | 23.8 |
| 3) FIESTA | MODERNA | MODERNA | 18.9 | 15.4 | 13.6 | 12.8 | 11.7 | 11.2 |
| 4) MONTANA | MODERNA | MODERNA | 2.0 | 5.7 | 8.0 | 8.9 | 8.5 | 8.9 |
| 5) DELICADOS | CIGATAM | CIGATAM | 8.6 | 10.1 | 9.9 | 8.4 | 7.2 | 7.3 |
| 6) ALAS | MODERNA | MODERNA | 6.6 | 7.6 | 7.4 | 6.1 | 5.4 | 5.4 |
| 7) FAROS | CIGATAM | CIGATAM | 4.0 | 5.4 | 5.7 | 4.4 | 3.8 | 3.7 |
| 8) VICEROY | MODERNA | MODERNA | 2.5 | 2.0 | 1.9 | 1.8 | 1.9 | 2.4 |
| 10) BENSON&HEDGES | PM | CIGATAM | 1.2 | 1.1 | 1.4 | 2.0 | 2.2 | 2.1 |
| 11) BARONET | CIGATAM | CIGATAM | 5.8 | 4.5 | 3.1 | 2.9 | 2.4 | 1.8 |
| 12) DEL PRADO | MODERNA | MODERNA | 1.9 | 1.7 | 1.6 | 1.2 | 0.9 | 0.9 |
| 13) GRATOS | MODERNA | MODERNA | - | - | 0.9 | 1.0 | 0.9 | 0.9 |
| 14) SALEM | RJR | MODERNA | 0.2 | 0.4 | 0.5 | 0.6 | 0.8 | 0.9 |
| 15) KENT | MODERNA | MODERNA | - | - | 0.9 | 0.9 | 1.0 | 0.7 |
| 16) DALTON | CIGATAM | CIGATAM | - | 1.7 | 2.8 | 1.5 | 0.8 | 0.6 |
| 17) ARGENTINOS | MODERNA | MODERNA | 1.0 | 1.0 | 0.9 | 0.7 | 0.6 | 0.5 |
| 18) BOHEMIOS | MODERNA | MODERNA | - | 1.2 | 0.9 | 0.4 | 0.3 | 0.2 |
| OTHERS | | | 5.5 | 5.2 | 3.4 | 2.9 | 2.2 | 2.1 |

MARKET SEGMENTATION %

| | | | | | | |
|----------------------|------|------|------|------|------|------|
| FILTER (NON-MENTHOL) | 76.1 | 70.0 | 71.4 | 75.0 | 77.9 | 79.3 |
| FILTER MENTHOL | 1.0 | 1.1 | 1.3 | 1.6 | 1.9 | 2.0 |
| NON-FILTER | 22.1 | 28.0 | 26.2 | 22.3 | 19.1 | 17.6 |
| NON FILTER MENTHOL | 0.8 | 0.9 | 1.1 | 1.1 | 1.1 | 1.1 |

PRICE SEGMENTATION %

| | | | | | | |
|--------|------|------|------|------|------|------|
| HIGH | 48.6 | 42.3 | 42.8 | 49.9 | 56.1 | 57.5 |
| MEDIUM | 29.4 | 29.8 | 29.9 | 27.8 | 24.9 | 23.8 |
| LOW | 22.0 | 27.9 | 27.3 | 22.3 | 19.0 | 18.7 |

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LATIN AMERICA 37

| (MEXICO) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|------|------|------|------|
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| LOW (9.0 - 12mg. tar) | 3.6 | 3.2 | 3.4 | 4.0 | 5.0 | 6.0 |
| MEDIUM (13.0 - 15mg. tar) | 6.9 | 7.1 | 6.5 | 4.4 | 3.4 | 2.6 |
| HIGH/FULL FLAVOR (15.0 - 20mg. tar) | 89.5 | 89.7 | 90.1 | 91.6 | 91.6 | 91.4 |
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLOND: AMERICAN | 47.2 | 41.0 | 42.3 | 49.9 | 55.9 | 57.5 |
| MIXED | 29.4 | 30.3 | 30.0 | 27.7 | 25.0 | 23.7 |
| BLACK | 23.4 | 28.7 | 27.7 | 22.4 | 19.1 | 18.9 |
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 31.9 | 30.8 | 29.5 | 29.7 | 30.5 | 29.0 |
| 71 MM TO 79 MM | 14.8 | 18.8 | 19.5 | 15.8 | 13.3 | 13.6 |
| 80 MM to 85 MM | 52.0 | 49.3 | 49.6 | 52.8 | 54.2 | 55.1 |
| 100MM | 1.3 | 1.1 | 1.4 | 1.7 | 2.0 | 2.3 |
| PACK COUNT SEGMENTATION % | | | | | | |
| 11 TO 15 CIGTS/PACK | 4.0 | 7.1 | 8.1 | 5.9 | 4.5 | 4.2 |
| 16 TO 19 CIGTS/PACK | 10.8 | 14.6 | 14.3 | 11.2 | 9.6 | 9.6 |
| 20 CIGTS/PACK | 85.2 | 78.3 | 77.6 | 82.9 | 85.9 | 86.2 |
| PACK TYPE SEGMENTATION % | | | | | | |
| FLIP TOP BOX | 17.1 | 23.0 | 26.6 | 29.7 | 31.8 | 32.9 |
| SOFT PACK | 82.9 | 77.0 | 73.4 | 70.3 | 68.2 | 67.1 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 3 | 3 | 3 | 3 | 3 | 3 |
| B) RADIO | 3 | 3 | 3 | 3 | 3 | 3 |
| C) NEWSPAPERS | 3 | 3 | 3 | 3 | 3 | 3 |
| D) MAGAZINES | 3 | 3 | 3 | 3 | 3 | 3 |
| E) COUPONS | 2 | 2 | 2 | 2 | 2 | 2 |
| F) POINT OF SALE | 3 | 3 | 3 | 3 | 3 | 3 |
| G) BILLBOARDS | 3 | 3 | 3 | 3 | 3 | 3 |
| H) CINEMA | 3 | 3 | 3 | 3 | 3 | 3 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

2500058479

LATIN AMERICA 38

| (MEXICO) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|--|------------------|------------------|------------------|------------------|------------------|
| HEALTH WARNING & T&N LISTINGS ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | A) PACKS B) CARTONS C) ADVERTISING | YES NO YES | YES NO YES | YES NO YES | YES NO YES | YES NO YES |
| SPECIFIC T&N NUMBERS ON: | A) PACKS B) CARTONS C) ADVERTISING | NO NO NO | NO NO NO | NO NO NO | NO NO NO | NO NO NO |
| TAR BAND PRINTED ON: | A) PACKS B) CARTONS | NO NO | NO NO | NO NO | NO NO | NO NO |

2500058480

LATIN AMERICA 39

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: PANAMA

| | | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|-----------|--------------|-------|-------|-------|-------|-------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | | 832.1 | 809.7 | 671.4 | 618.4 | 775.2 | 746.1 |
| POPULATION TOTAL (MILLIONS) | | 2,093 | 2,146 | 2,199 | 2,254 | 2,315 | 2,373 |
| PER CAPITA CONSUMPTION | | 398 | 377 | 305 | 274 | 335 | 314 |
| SMOKER INCIDENCE | | | | | | | |
| % OF TOTAL POPULATION | | 27 | NA | NA | NA | 19 | NA |
| % OF FEMALE POPULATION | | 24 | NA | NA | NA | 7 | NA |
| % OF MALE POPULATION | | 76 | NA | NA | NA | 32 | NA |
| COMPANY SHARES | | | | | | | |
| 1) TISA (BAT) | | 59.8 | 60.4 | 60.4 | 63.5 | 64.1 | 64.5 |
| 2) TABACAL (PMI) | | 40.2 | 39.6 | 39.6 | 36.5 | 35.9 | 35.5 |
| BRAND FAMILY SHARES % | | | | | | | |
| | TRADEMARK | | | | | | |
| BRAND NAME | OWNERSHIP | MANUFACTURER | | | | | |
| 1) VICEROY | BAT | TISA | 33.1 | 33.8 | 32.9 | 32.7 | 31.8 |
| 2) MARLBORO | PMI | TABACAL | 21.1 | 21.6 | 21.4 | 19.3 | 20.1 |
| 3) KOOL | BAT | TISA | 13.0 | 13.1 | 13.0 | 13.7 | 14.6 |
| 4) LUCKY STRIKE | BAT | TISA | 1.3 | 1.8 | 3.0 | 5.0 | 7.2 |
| 5) MENTOLADOS | TABACAL | TABACAL | 8.3 | 8.1 | 8.5 | 8.4 | 7.5 |
| 6) RECORD | BAT | TISA | 3.8 | 3.9 | 4.2 | 4.7 | 3.9 |
| 7) L&M | PMI | TABACAL | - | - | - | - | 0.7 |
| 8) IMPERIAL | BAT | TISA | 3.1 | 3.0 | 3.1 | 3.3 | 3.0 |
| 9) BELMONT | BAT | TISA | 4.4 | 4.0 | 3.7 | 3.6 | 2.6 |
| 10) WEST | REEMTSMA | TABACAL | 3.5 | 3.7 | 3.6 | 3.5 | 3.1 |
| 11) MERIT | PMI | TABACAL | 1.9 | 1.9 | 2.0 | 1.8 | 1.6 |
| 12) MONTEREY | TABACAL | TABACAL | 1.9 | 1.6 | 1.5 | 1.3 | 1.1 |
| 13) NACIONAL | TABACAL | TABACAL | 1.0 | 0.8 | 0.8 | 0.6 | 0.6 |
| 14) PARLIAMENT | PMI | TABACAL | 0.7 | 0.6 | 0.6 | 0.5 | 0.4 |
| OTHERS | | | 4.2 | 3.9 | 4.7 | 6.6 | 1.8 |
| | | | | | | | 0.8 |

2500058481

LATIN AMERICA 40

| (PANAMA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|-------|-------|-------|-------|-------|-------|
| MARKET SEGMENTATION % | | | | | | |
| FILTER (NON-MENTHOL) | 75.2 | 75.4 | 74.8 | 74.1 | 74.8 | 74.5 |
| FILTER MENTHOL | 24.8 | 24.6 | 25.2 | 25.9 | 25.2 | 25.5 |
| PLAIN | -- | -- | -- | -- | -- | -- |
| PRICE SEGMENTATION % | | | | | | |
| PREMIUM | -- | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 |
| HIGH | 71.3 | 71.6 | 70.3 | 68.4 | 68.7 | 67.6 |
| MEDIUM | 13.7 | 13.0 | 13.0 | 12.7 | 10.7 | 9.9 |
| LOW | 15.0 | 15.2 | 16.5 | 18.7 | 20.4 | 22.3 |
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| LOW (H 8.0-11.5mg. tar) | 3.0 | 3.6 | 4.2 | 4.3 | 4.4 | 4.9 |
| HIGH/FULL FLAVOR (H 15.0-17.0mg. tar) | 97.0 | 96.4 | 95.8 | 95.7 | 95.6 | 95.1 |
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLOND: AMERICAN | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| LENGTH SEGMENTATION % | | | | | | |
| 80 mm to 85 MM | 99.8 | 99.8 | 99.8 | 99.8 | 99.8 | 99.8 |
| 100 MM | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 |
| PACK COUNT SEGMENTATION % | | | | | | |
| UP TO 10 CIGTS/PACK | 53.6 | 55.4 | 57.8 | 59.7 | 58.7 | 59.9 |
| 20 CIGTS/PACK | 46.4 | 44.6 | 42.2 | 40.3 | 41.3 | 40.1 |
| PACK TYPE SEGMENTATION | | | | | | |
| SOFT PACK | 86.8 | 86.7 | 87.0 | 87.3 | 83.4 | 75.9 |
| FLIP TOP BOX | 13.2 | 13.3 | 13.0 | 12.7 | 16.1 | 24.1 |

2500058482

LATIN AMERICA 41

(PANAMA)

1986 1987 1988 1989 1990 1991

CIGARETTE ADVERTISING MEDIA AVAILABILITY

*NOTATIONS: 1) YES
2) BANNED
3) RESTRICTED

| | | | | | | |
|------------------|---|---|---|---|---|---|
| A) TELEVISION | 1 | 1 | 1 | 1 | 1 | 1 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

HEALTH WARNING & T&N LISTINGS

ANSWER EITHER: YES OR NO

| | | | | | | |
|-------------|----------------|-----|-----|-----|-----|-----|
| WARNING ON: | A) PACKS | YES | YES | YES | YES | YES |
| | B) CARTONS | NO | NO | NO | NO | NO |
| | C) ADVERTISING | NO | NO | NO | NO | NO |

SPECIFIC T&N NUMBERS ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

TAR BANDS PRINTED ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

2500058483

LATIN AMERICA 42

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: PUERTO RICO

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------------------|---------------------|-------|---------|-------|---------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | 2,996 | 3,301 | 3,188 | 3,082.6 | 2,924 | 3,010.4 |
| LOCAL MANUFACTURE | 2,485 | 2724 | 2538 | 2379 | 2114 | 2,102.6 |
| IMPORTED FROM USA | 511 | 577 | 608 | 599.6 | 706 | 803.5 |
| IMPORTED FROM GUATEMALA | -- | -- | 42 | 104 | 104 | 104.3 |
| POPULATION TOTAL (MILLIONS) | 3.2 | 3.3 | 3.3 | 3.3 | 3.3 | 3.5 |
| PER CAPITA CONSUMPTION | 936 | 1000 | 966 | 934 | 885 | 860 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 22.1 | 22.1 | 22.1 | N/A | 42.5 | 41.6 |
| % OF FEMALE POPULATION | 12.0 | 12.0 | 12.0 | N/A | 39.8 | 38.8 |
| % OF MALE POPULATION | 31.0 | 31.0 | 31.0 | N/A | 45.5 | 44.6 |
| COMPANY SHARES | | | | | | |
| 1) RJR | 75.8 | 74.1 | 79.6 | 77.2 | 72.3 | 69.8 |
| 2) P.M. | 13.0 | 12.2 | 13.1 | 12.6 | 16.3 | 18.8 |
| OTHERS | 11.2 | 13.7 | 7.3 | 10.2 | 11.4 | 11.4 |
| BRAND FAMILY SHARES % | | | | | | |
| | TRADEMARK | | | | | |
| BRAND NAME | OWNERSHIP | MANUFACTURER | | | | |
| 1) WINSTON | RJR | RJR | 62.8 | 62.6 | 70.4 | 68.6 |
| 2) MARLBORO | PM | PM | 5.5 | 5.3 | 6.0 | 5.8 |
| 3) SALEM | RJR | RJR | 10.8 | 9.6 | 8.5 | 8.0 |
| 4) MERIT | PM | PM | 5.4 | 5.0 | 5.1 | 4.9 |
| OTHERS | | | 15.5 | 17.5 | 10.0 | 12.7 |
| | | | | | | |

2500058484

LATIN AMERICA 43

| (PUERTO RICO) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|-------|-------|-------|--------|-------|-------|
| MARKET SEGMENTATION % | | | | | | |
| FILTER (NON-MENTHOL) | 85.0 | 85.0 | 85.4 | 84.6 | 83.3 | 83.6 |
| FILTER MENTHOL | 14.0 | 14.0 | 14.4 | 15.2 | 16.5 | 16.3 |
| NON-FILTER | 1.0 | 1.0 | 0.2 | 0.2 | 0.2 | 0.1 |
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| LOW | 13.0 | 13.0 | 6.4 | 6.4 | 8.0 | 9.0 |
| FULL FLAVOR | 87.0 | 87.0 | 93.6 | 93.6 | 92.0 | 91.0 |
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLOND: AMERICAN | 100.0 | 100.0 | 100.0 | *100.0 | 100.0 | 100.0 |
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 1.0 | 1.0 | 1.0 | *1.0 | 0.2 | 0.1 |
| 80 MM to 85 MM | 97.0 | 97.0 | 97.0 | *97.0 | 97.2 | 97.0 |
| 100 MM | 2.0 | 2.0 | 2.0 | *2.0 | 2.6 | 2.9 |
| PACK COUNT SEGMENTATION % | | | | | | |
| UP TO 10 CIGTS/PACK | 14.6 | 14.4 | 14.2 | *14.2 | 14.0 | 16.1 |
| 20 CIGTS/PACK | 84.5 | 84.3 | 84.2 | *84.6 | 81.1 | 74.9 |
| 14 CIGTS/PACK | 0.5 | 0.7 | 0.9 | 1.2 | 4.9 | 9.0 |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 23.0 | 23.0 | 7.0 | 7.0 | 7.0 | 7.0 |
| FLIP TOP BOX | 77.0 | 77.0 | 93.0 | 93.0 | 93.0 | 93.0 |

2500058485

LATIN AMERICA 44

(PUERTO RICO)

1986 1987 1988 1989 1990 1991

CIGARETTE ADVERTISING MEDIA AVAILABILITY

*NOTATIONS: 1) YES
2) BANNED
3) RESTRICTED

| | | | | | | |
|------------------|---|---|---|---|---|---|
| A) TELEVISION | 2 | 2 | 2 | 2 | 2 | 2 |
| B) RADIO | 2 | 2 | 2 | 2 | 2 | 2 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 3 | 3 | 3 | 3 | 3 | 3 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

HEALTH WARNING & T&N LISTINGS

ANSWER EITHER: YES OR NO

| | | | | | | |
|-------------|----------------|-----|-----|-----|-----|-----|
| WARNING ON: | A) PACKS | YES | YES | YES | YES | YES |
| | B) CARTONS | YES | YES | YES | YES | YES |
| | C) ADVERTISING | YES | YES | YES | YES | YES |

SPECIFIC T&N NUMBERS ON:

| | | | | | | |
|----------------|----|-----|-----|-----|-----|-----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | YES | YES | YES | YES | YES |

TAR BANDS PRINTED ON:

| | | | | | | |
|----------------|----|----|----|----|----|----|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

2500058486

LATIN AMERICA 45

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: URUGUAY

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|---------|---------|---------|---------|---------|---------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | 2,789.2 | 3,136.9 | 3,201.8 | 3,308.3 | 3,145.1 | 3,255.5 |
| POPULATION TOTAL (MILLIONS) | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 |
| PER CAPITA CONSUMPTION | 930 | 1,045 | 2,067 | 1,103 | 1,048 | 1,085 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 33.0 | 34.0 | 34.0 | 34.0 | 37.0 | 35.0 |
| % OF FEMALE POPULATION | 46.0 | 49.0 | 49.0 | 49.0 | 14.0 | 45.0 |
| % OF MALE POPULATION | 54.0 | 51.0 | 51.0 | 51.0 | 23.0 | 54.0 |
| COMPANY SHARES | | | | | | |
| 1) MAILHOS GROUP | 76.8 | 77.3 | 77.3 | 77.3 | 76.1 | 74.8 |
| 2) A.H.S.A. - PM | 23.2 | 22.7 | 22.7 | 22.7 | 23.9 | 25.2 |

2500058487

LATIN AMERICA 46

| (URUGUAY) | | | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|---------------------|-------------------------------|------|------|------|------|------|------|
| BRAND SHARES % | | | | | | | | |
| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | | | | | | |
| 1) NEVADA | | MAILHOS | 34.3 | 37.7 | 39.0 | 39.6 | 39.0 | 37.4 |
| 2) CORONADO | | MAILHOS | 16.0 | 17.3 | 17.8 | 17.9 | 17.2 | 16.2 |
| 3) CASINO 80 | | AHSA | 14.3 | 13.1 | 13.0 | 12.8 | 13.0 | 13.4 |
| 4) FIESTA LIGHTS | | AHSA | 1.4 | 1.7 | 2.5 | 3.7 | 5.0 | 6.6 |
| 5) J&M LIGHTS | | MAILHOS | 4.1 | 4.2 | 4.4 | 4.6 | 5.0 | 5.6 |
| 6) CORONADO UL. LIGHTS | | MAILHOS | 3.1 | 3.0 | 3.0 | 2.9 | 2.4 | 2.2 |
| 7) MARLBORO | | AHSA | -- | 1.9 | 1.7 | 1.7 | 1.9 | 2.1 |
| 8) CORONADO LIGHTS | | MAILHOS | 0.3 | 0.2 | 0.1 | 0.5 | 1.9 | 2.0 |
| 9) J&M | | MAILHOS | 4.5 | 3.4 | 2.6 | 2.1 | 1.9 | 1.8 |
| 10) LA PAZ EXTRA | | MAILHOS | 4.0 | 3.0 | 2.5 | 2.3 | 2.0 | 1.7 |
| 11) GALAXY | | AHSA | 2.9 | 3.4 | 2.7 | 2.3 | 2.0 | 1.4 |
| 12) RICHMOND | | MAILHOS | 1.4 | 1.2 | 1.2 | 1.1 | 1.1 | 1.0 |
| 13) NEVADA LIGHTS BOX | | MAILHOS | -- | -- | -- | -- | -- | 1.0 |
| 14) LA PAZ C/F | | MAILHOS | 2.0 | 1.5 | 1.3 | 1.2 | 1.0 | 0.9 |
| 15) RICHMOND LIGHTS | | MAILHOS | 1.1 | 0.8 | 0.8 | 0.8 | 0.6 | 0.7 |
| OTHERS | | | 10.9 | 5.9 | 6.0 | 5.1 | 7.3 | 6.0 |
| MARKET SEGMENTATION % | | | | | | | | |
| FILTER (NON-MENTHOL) | | | 94.1 | 95.5 | 96.2 | 96.6 | 96.9 | 97.3 |
| FILTER MENTHOL | | | 0.1 | 0.1 | 0.1 | -- | 0.1 | 0.1 |
| NON-FILTER | | | 5.8 | 4.4 | 3.9 | 3.4 | 3.0 | 2.6 |
| PRICE SEGMENTATION | | | | | | | | |
| PREMIUM | | | 2.4 | 2.0 | 1.9 | 1.9 | 2.0 | 1.9 |
| HIGH | | | 63.5 | 68.1 | 69.2 | 70.6 | 71.0 | 71.2 |
| MEDIUM | | | 27.3 | 23.4 | 22.1 | 21.3 | 21.3 | 21.9 |
| LOW | | | 6.8 | 6.5 | 6.8 | 6.2 | 5.7 | 5.0 |
| TAR & NICOTINE SEGMENTATION % | | | | | | | | |
| ULTRA LOW | | <u>FTC-TAR</u> FROM 0 TO 6 | 0.3 | 2.0 | 0.1 | -- | -- | - |
| LOW | | FROM 6 TO 9 | 6.4 | 5.2 | 5.3 | 5.2 | 4.4 | 3.6 |
| MEDIUM | | FROM 10 TO 15 | 21.1 | 7.9 | 8.6 | 44.1 | 48.6 | 31.4 |
| HIGH/FULL FLAVOR | | 15 - ABOVE | 72.2 | 84.9 | 86.0 | 50.7 | 47.0 | 65.0 |

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LATIN AMERICA 47

| (URUGUAY) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|------|------|------|------|
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLOND: AMERICAN | 91.4 | 93.5 | 94.6 | 95.1 | 95.7 | 96.4 |
| BLACK | 8.6 | 6.5 | 5.4 | 4.9 | 4.3 | 3.6 |
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 7.2 | 5.2 | 4.4 | 4.0 | 3.4 | 2.9 |
| 80 MM to 85 MM | 90.8 | 93.2 | 94.3 | 94.8 | 95.6 | 96.4 |
| 100MM | 2.0 | 1.6 | 1.3 | 1.2 | 1.0 | 0.7 |
| PACK COUNT SEGMENTATION % | | | | | | |
| UP TO 10 CIGTS/PACK | 7.9 | 5.8 | 5.6 | 5.4 | 5.4 | 5.4 |
| 16 TO 19 CIGTS/PACK | 6.9 | 5.1 | 4.2 | 3.9 | 3.3 | 2.8 |
| 20 CIGTS/PACK | 85.0 | 88.9 | 90.1 | 90.6 | 91.2 | 91.7 |
| 21 TO 24 CIGTS/PACK | -- | -- | -- | -- | -- | -- |
| 25 CIGTS/PACK (27 CIGTS/PACK) | 0.2 | 0.2 | 0.1 | 0.1 | 0.1 | 0.1 |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 97.9 | 97.6 | 96.7 | 95.0 | 91.9 | 88.4 |
| FLIP TOP BOX | 2.1 | 2.4 | 3.3 | 5.0 | 8.1 | 11.6 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 1 | 1 | 1 | 1 | 1 | 1 |
| B) RADIO | 1 | 1 | 1 | 1 | 1 | 1 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |

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| (URUGUAY) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|--|------------------|------------------|------------------|------------------|------------------|
| HEALTH WARNING & T&N LISTINGS ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | A) PACKS B) CARTONS C) ADVERTISING | YES NO YES | YES NO YES | YES NO YES | YES NO YES | YES NO YES |
| SPECIFIC T&N NUMBERS ON: | A) PACKS B) CARTONS C) ADVERTISING | NO NO NO | NO NO NO | NO NO NO | NO NO NO | NO NO NO |
| TAR BAND PRINTED ON: | A) PACKS B) CARTONS C) ADVERTISING | NO NO NO | NO NO NO | NO NO NO | NO NO NO | NO NO NO |
| CONSUMPTION OF OTHER TOBACCO PRODUCTS ROLL YOUR OWN (THOUSAND KILOS) | 680.5 | 757.3 | 829.0 | 856.0 | 1,047 | 983.7 |

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LATIN AMERICA 49

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: VENEZUELA

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|---------------|---------------|---------------|---------------|---------------|---------------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | 17,436 | 17,380 | 17,800 | 17,292 | 15,862 | 12,656 |
| POPULATION TOTAL (MILLIONS) | 17.8 | 18.3 | 18.7 | 19.2 | 19.7 | 18.1 |
| PER CAPITA CONSUMPTION | 1,021 | 951 | 949 | 898 | 804 | 699 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 19.2 | 20.0 | 20.0 | 19.0 | 30.0 | 25.0 |
| % OF FEMALE POPULATION | 43.0 | 43.0 | 43.0 | 43.0 | 34.0 | 23.0 |
| % OF MALE POPULATION | 57.0 | 57.0 | 57.0 | 57.0 | 27.0 | 26.0 |
| COMPANY SHARES | | | | | | |
| 1) BIGOTT (BAT) | 81.3 | 76.5 | 76.5 | 73.0 | 75.7 | 76.9 |
| 2) CATANA | 18.7 | 23.5 | 23.5 | 27.0 | 24.3 | 23.1 |

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LATIN AMERICA 50

| (VENEZUELA) | | | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|------------------------|--------------|---------|---------|---------|---------|---------|--------|
| BRAND FAMILY SHARES % | | | | | | | | |
| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | | | | | | |
| 1) BELMONT | BIGOTT | BIGOTT | 41.0 | 42.8 | 47.2 | 45.7 | 40.5 | 40.6 |
| 2) CONSUL | B.A.T. | BIGOTT | 38.3 | 33.1 | 31.8 | 22.9 | 34.3 | 35.6 |
| 3) ASTOR | CATANA | CATANA | 11.5 | 12.1 | 11.3 | 13.5 | 9.4 | 13.5 |
| 4) FORTUNA | CATANA | CATANA | -- | -- | -- | 10.7 | 11.0 | 6.0 |
| 5) MARLBORO | P. MORRIS | CATANA | 1.0 | 1.6 | 2.0 | 2.5 | 3.7 | 3.6 |
| 6) YORK | CATANA | CATANA | 2.8 | 2.0 | 1.2 | 1.5 | -- | -- |
| 7) LIDER | P. MORRIS | CATANA | 2.5 | 2.2 | 1.3 | 1.1 | -- | -- |
| 8) VICEROY | B.A.T. | BIGOTT | 0.3 | 0.5 | 0.5 | 0.5 | 0.5 | 0.3 |
| 9) OTHERS | | | 2.6 | 5.7 | 4.7 | 1.6 | 0.6 | 0.4 |
| MARKET SEGMENTATION % | | | | | | | | |
| FILTER (NON-MENTHOL) | | | 99.9 | 99.9 | 99.9 | 99.9 | 99.9 | 99.9 |
| FILTER MENTHOL | | | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| NON-FILTER | | | --- | --- | --- | --- | --- | --- |
| PRICE SEGMENTATION % (SHARES) | | | | | | | | |
| PREMIUM | | | 1.4 | 1.4 | 1.5 | 3.2 | 1.5 | 4.3 |
| HIGH | | | 5.15 | 59.0 | 54.1 | 59.3 | 43.2 | 40.7 |
| MEDIUM | | | 47.1 | 39.6 | 39.2 | 26.9 | -- | -- |
| LOW | | | --- | --- | 5.2 | 10.6 | 55.3 | 55.0 |
| PRICE SEGMENTATION (US\$ PRICE) | | | | | | | | |
| PREMIUM | | | .63-61 | .59-61 | 0.45 | 0.37 | 0.68 | 0.76 |
| HIGH | | | .51 | .54 | 0.40 | 0.33 | 0.64 | 0.71 |
| MEDIUM | | | --- | --- | 0.35 | 0.30 | -- | -- |
| LOW | | | .43 | .45 | 0.33 | 0.28 | 0.58 | (55.0) |
| (BASE Bs/\$) | | | (11.80) | (13.45) | (20.00) | (30.00) | (53.00) | -- |

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LATIN AMERICA 51

| (VENEZUELA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|------|------|------|------|
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 97.3 | 95.7 | 95.9 | 95.1 | 95.9 | 94.8 |
| 80 MM to 85 MM | 2.5 | 3.9 | 3.6 | 4.4 | 3.5 | 4.6 |
| 100MM | 0.2 | 0.4 | 0.5 | 0.5 | 0.6 | 0.6 |
| PACK COUNT SEGMENTATION % | | | | | | |
| 20 CIGTS/PACK | 99.9 | 96.9 | 95.9 | 94.3 | 89.3 | 85.1 |
| 10 CIGTS/PACK | 0.1 | 2.9 | 3.9 | 5.6 | 10.7 | 14.9 |
| 14 CIGTS/PACK | -- | 0.2 | 0.2 | 0.1 | -- | -- |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 98.3 | 96.9 | 96.8 | 96.0 | 96.6 | 95.4 |
| FLIP TOP BOX | 1.7 | 3.1 | 3.2 | 4.0 | 3.4 | 4.6 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 2 | 2 | 2 | 3/2 | 3/2 | 2 |
| B) RADIO | 2 | 2 | 2 | 3/2 | 3/2 | 2 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1/2 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | 1 | 1 | 1 | 1 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 1 |
| I) SAMPLING | 1 | 1 | 1 | 1 | 1 | 1 |
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| LOW (Under 10.0mg/cig; Nicotine: under 0 .70mg/cig) | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| MEDIUM (Under 10.0mg/cig; Nicotine: under 0.70mg/cig) | 5.9 | 7.1 | -- | -- | -- | -- |
| HIGH/FULL FLAVOR (Over 10.0mg/cig; Nicotine: over .70mg/cig) | 94.0 | 92.8 | 99.9 | 99.9 | 99.9 | 99.9 |

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LATIN AMERICA 52

| (VENEZUELA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|------|------|------|------|------|------|
| HEALTH WARNING & T&N LISTINGS ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | | | | | | |
| A) PACKS | YES | YES | YES | YES | YES | YES |
| B) CARTONS | YES | YES | YES | YES | YES | YES |
| C) ADVERTISING | YES | YES | YES | YES | YES | YES |
| SPECIFIC T&N NUMBERS ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |
| TAR BAND PRINTED ON: | | | | | | |
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

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LATIN AMERICA 53

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Source: <https://www.industrydocuments.ucsf.edu/docs/ftgl0000>

CANADA

CANADA

2500058496

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: CANADA

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|---------------|---------------|---------------|---------------|---------------|----------------|
| TOTAL CIGARETTE CONSUMPTION (MILLIONS) | 55,437 | 52,419 | 50,915 | 47,430 | 45,710 | 38,907 |
| POPULATION TOTAL (MILLIONS) | 25.6 | 25.9 | 26.1 | 26.2 | 26.4 | 26.8 |
| PER CAPITA CONSUMPTION | 2,166 | 2,027 | 1,951 | 1,808 | 1,727 | 1,453.0 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 32.0 | N/A | N/A | N/A | N/A | N/A |
| % OF FEMALE POPULATION | 29.4 | N/A | N/A | N/A | N/A | N/A |
| % OF MALE POPULATION | 34.7 | N/A | N/A | N/A | N/A | N/A |
| COMPANY SHARES | | | | | | |
| 1) IMPERIAL | 51.45 | 54.6 | 56.3 | 58.0 | 60.3 | 62.1 |
| 2) ROTHMANS/BENSON & HEDGES* | 20.69 | 28.8 | 27.0 | 25.1 | 23.3 | 22.4 |
| 3) MACDONALD | 15.85 | 16.6 | 16.7 | 16.9 | 16.4 | 15.5 |
| 4) ROTHMANS* | 20.69 | --- | --- | --- | --- | --- |
| 5) B&H* | 11.85 | --- | --- | --- | --- | --- |

*NOTE - ROTHMANS AND BENSON & HEDGES WERE MERGED IN 1987

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CANADA 1

| (CANADA) | | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|---------------------|--------------|-------|------|------|------|------|
| BRAND FAMILY SHARES % | | | | | | | |
| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | | | | | |
| 1) PLAYERS | | IMPERIAL | 20.90 | 23.5 | 24.9 | 25.5 | 26.2 |
| 2) DU MAURIER | | IMPERIAL | 15.66 | 19.7 | 20.3 | 21.6 | 23.6 |
| 3) EXPORT | | MACDONALD | 11.32 | 12.9 | 14.1 | 14.7 | 14.6 |
| 4) CRAVEN | | ROTHMAN | 6.90 | 7.5 | 6.9 | 6.4 | 6.0 |
| 5) MATINEE | | IMPERIAL | 5.07 | 5.6 | 5.8 | 6.1 | 6.0 |
| 6) ROTHMANS | | ROTHMAN | 6.56 | 7.0 | 6.8 | 6.3 | 5.9 |
| 7) BENSON & HEDGES | | B & H | 5.99 | 4.1 | 3.8 | 3.6 | 3.4 |
| 8) BELVEDERE | | B & H | 2.15 | 2.6 | 2.6 | 2.4 | 2.3 |
| 9) NUMBER 7 | | ROTHMAN | 6.38 | 2.8 | 2.2 | 1.9 | 1.8 |
| 10) CAMEO | | IMPERIAL | 1.70 | 1.7 | 1.7 | 1.6 | 1.6 |
| 11) MARK TEN | | B & H | 1.50 | 1.9 | 1.8 | 1.7 | 1.5 |
| 12) VISCOUNT | | B & H | 1.25 | 1.4 | 1.3 | 1.3 | 1.2 |
| 13) PETER JACKSON | | IMPERIAL | 6.10 | 2.1 | 1.8 | 1.5 | 1.3 |
| 14) VANTAGE | | MACDONALD | 1.10 | 1.0 | 1.1 | 1.1 | 0.9 |
| 15) MACDONALD | | R.J. R. | 3.4 | 2.6 | 1.4 | 1.1 | 0.9 |
| MARKET SEGMENTATION % | | | | | | | |
| FILTER | | | 98.27 | 98.4 | 98.6 | 98.7 | 98.8 |
| PLAIN | | | 1.73 | 1.6 | 1.4 | 1.3 | 1.2 |
| PRICE SEGMENTATION % | | | | | | | |
| REGULAR | | | 99.1 | 96.9 | 81.9 | N/A | N/A |
| *ECONOMY/VALUE | | | .90 | 3.1 | 18.1 | N/A | N/A |
| NO PRICE SEGMENTATION AMONG 4 MAJOR DOMESTIC MANUFACTURES, EXCEPT FOR \$0.10 PER CARTON KING SIZE/REGULAR DIFFERENTIAL, UNTIL 1985 VALUE INITIATIVES. | | | | | | | |

***(INCLUDES ALL GENERICS, WHICH ARE IMPORTED OR PRODUCED BY BASTOS AND VALUE INITIATIVES BY THE 4 DOMESTIC MANUFACTURERS SINCE SEPTEMBER 1985).**

2500058498

CANADA 2

| (CANADA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|------|------|------|------|
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| ULTRA LOW (0-5MG) | 8.7 | N/A | N/A | N/A | N/A | N/A |
| LOW (6-9MG) | 11.7 | N/A | N/A | N/A | N/A | N/A |
| MEDIUM (10-15MG) | 58.1 | N/A | N/A | N/A | N/A | N/A |
| HIGH/FULL FLAVOR (15MG+) | 21.5 | N/A | N/A | N/A | N/A | N/A |
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLOND: AMERICAN | 0.7 | 0.5 | 0.7 | 0.5 | 0.7 | 0.3 |
| VIRGINIA | 99.3 | 99.5 | 99.3 | 99.5 | 99.7 | 99.7 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 2 | 2 | 2 | 2 | 2 | 2 |
| B) RADIO | 2 | 2 | 2 | 2 | 2 | 2 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 2 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 3 | 3 | 3 | 3 | 3 | 2 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 2 |
| G) BILLBOARDS | 3 | 3 | 3 | 3 | 3 | 2 |
| H) CINEMA | 1 | 1 | 1 | 1 | 1 | 2 |
| I) SAMPLING (12 MONTHS ON NEW INTRODUCTION) | | | | | | |

2500058499

CANADA 3

| (CANADA) | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|----------------|------|------|------|------|------|
| HEALTH WARNING & T&N LISTINGS | | | | | | |
| ANSWER EITHER: YES OR NO | | | | | | |
| WARNING ON: | A) PACKS | YES | YES | YES | YES | YES |
| | B) CARTONS | YES | YES | YES | YES | YES |
| | C) ADVERTISING | YES | YES | YES | YES | YES |
| SPECIFIC T&N NUMBERS ON: | | | | | | |
| | A) PACKS | YES | YES | YES | YES | YES |
| | B) CARTONS | NO | NO | NO | NO | NO |
| | C) ADVERTISING | YES | YES | YES | YES | YES |
| TAR BANDS PRINTED ON: | | | | | | |
| | A) PACKS | NO | NO | NO | NO | NO |
| | B) CARTONS | NO | NO | NO | NO | NO |
| | C) ADVERTISING | NO | NO | NO | NO | NO |

CONSUMPTION OF OTHER TOBACCO PRODUCTS

| | | | | | | |
|---|---------|-------|-------|-------|-------|-------|
| ROLL YOUR OWN (THOUSAND KILOS) | 7,412.8 | N/A | N/A | N/A | N/A | N/A |
| *CIGARS (MILLIONS) | 285.0 | 261.0 | 239.0 | 231.0 | 190.2 | 337.7 |
| *PIPE TOBACCO (THOUSAND KILOS) | 36.5 | N/A | N/A | N/A | N/A | N/A |
| *CHEWING TOBACCO (THOUSAND KILOS) AND SNUFF (THOUSAND KILOS) | | | | | | |

*(LOCAL PRODUCTION. DOES NOT INCLUDE
IMPORTS WHICH REPRESENT A SUBSTANTIAL
PART OF THE MARKET).

2500058500

CANADA 4

USA

2500058501

U.S.A MARKET

2500058502

PHILIP MORRIS INTERNATIONAL FACT BOOK

NAME OF MARKET: U.S.A.

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|----------------|----------------|----------------|----------------|----------------|----------------|
| TOTAL CIGARETTE SHIPMENTS (MILLIONS) | 581,933 | 570,034 | 557,803 | 523,587 | 521,811 | 509,217 |
| POPULATION TOTAL (MILLIONS) | 240.9 | 243.1 | 246.0 | 248.3 | 250.4 | 252.5 |
| PER CAPITA CONSUMPTION | 2,416 | 2,345 | 2,267 | 2,109 | 2,084 | 2,017 |
| SMOKER INCIDENCE | | | | | | |
| % OF TOTAL POPULATION | 31.2 | 30.3 | 29.0 | 28.8 | 29.1 | 27.7 |
| % OF FEMALE POPULATION | 29.2 | 28.4 | 27.0 | 26.9 | 27.3 | 26.0 |
| % OF MALE POPULATION | 33.4 | 32.5 | 31.1 | 30.8 | 31.1 | 29.7 |
| COMPANY SHARES | | | | | | |
| 1) PHILIP MORRIS | 36.9 | 37.8 | 39.3 | 41.9 | 42.3 | 43.3 |
| 2) R.J. REYNOLDS | 32.4 | 32.5 | 31.8 | 28.5 | 29.6 | 27.8 |
| 3) BROWN & WILLIAMSON | 11.7 | 11.0 | 10.9 | 11.4 | 10.3 | 11.1 |
| 4) LORILLARD | 8.1 | 8.2 | 8.2 | 7.9 | 7.6 | 7.3 |
| 5) AMERICAN BRANDS | 7.2 | 6.9 | 7.0 | 7.0 | 6.8 | 7.0 |
| 6) THE LIGGETT GROUP | 3.8 | 3.5 | 2.8 | 3.3 | 3.4 | 3.4 |

SOURCES: M.S.A. U.S. TOTAL SHARE REPORTS, ROPER, CENSUS BUREAU

2500058503

USA 1

(U.S.A.)

1986 1987 1988 1989 1990 1991

BRAND FAMILY SHARES %

| BRAND NAME | TRADEMARK OWNERSHIP | MANUFACTURER | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--------------------|---------------------|--------------------|------|------|------|------|------|------|
| 1) MARLBORO | | PHILIP MORRIS | 23.1 | 23.6 | 24.9 | 26.4 | 26.0 | 25.8 |
| 2) WINSTON | | R.J. REYNOLDS | 11.2 | 11.1 | 10.8 | 9.0 | 8.8 | 7.5 |
| 3) SALEM | | R.J. REYNOLDS | 7.8 | 7.7 | 7.3 | 6.2 | 6.2 | 5.5 |
| 4) NEWPORT | | LORILLARD | 3.8 | 4.2 | 4.4 | 4.7 | 4.6 | 4.7 |
| 5) KOOL | | BROWN & WILLIAMSON | 6.4 | 6.0 | 6.0 | 6.0 | 4.9 | 4.6 |
| 6) DORAL | | R. J. REYNOLDS | 2.1 | 3.0 | 3.4 | 3.6 | 4.3 | 4.6 |
| 7) CAMEL | | R.J. REYNOLDS | 4.3 | 4.2 | 4.3 | 3.9 | 4.4 | 4.0 |
| 8) BENSON & HEDGES | | PHILIP MORRIS | 4.3 | 4.2 | 3.9 | 3.9 | 3.6 | 3.2 |
| 9) MERIT | | PHILIP MORRIS | 4.0 | 3.9 | 3.8 | 3.8 | 3.5 | 3.1 |
| 10) VIRGINIA SLIMS | | PHILIP MORRIS | 2.9 | 3.1 | 3.0 | 3.2 | 3.1 | 2.8 |
| 11) CAMBRIDGE | | PHILIP MORRIS | 0.6 | 1.1 | 1.8 | 2.3 | 2.5 | 2.8 |
| 12) GENERICS | | BROWN & WILLIAMSON | 1.8 | 1.6 | 1.4 | 1.1 | 1.3 | 2.1 |
| 13) VANTAGE | | R.J. REYNOLDS | 3.2 | 3.1 | 3.0 | 2.5 | 2.4 | 2.0 |
| 14) GENERICS | | PHILIP MORRIS | 0.1 | 0.2 | 0.3 | 0.3 | 0.7 | 1.9 |
| 15) PALL MALL | | AMERICAN | 3.2 | 3.1 | 2.9 | 2.7 | 2.2 | 1.9 |
| 16) OTHERS | | | 21.2 | 19.9 | 18.8 | 20.4 | 21.5 | 23.5 |

MARKET SEGMENTATION %

| | | | | | | |
|----------------------|------|------|------|------|------|------|
| FILTER (NON-MENTHOL) | 67.0 | 67.2 | 67.8 | 68.5 | 69.7 | 70.4 |
| FILTER MENTHOL | 27.5 | 27.7 | 27.5 | 27.1 | 26.3 | 25.9 |
| NON-FILTER | 5.5 | 5.1 | 4.7 | 4.3 | 4.0 | 3.7 |

PRICE SEGMENTATION %

| | | | | | | |
|---------|------|------|------|------|------|------|
| HIGH | 91.1 | 89.8 | 88.9 | 85.2 | 80.8 | 75.0 |
| ECONOMY | 8.9 | 10.2 | 11.1 | 14.8 | 19.2 | 25.0 |

*Economy includes all Generic packings (B&W Generics, Liggett Generics, Cambridge, Falcon Lts., American Lights, Alpine, PM Generics, R.J.R. Generics, Doral, Pyramid, Bristol, Magna, Sterling, Misty, Bull Durham, Raleigh Extra) and Value Packings (Century, Richland, Players 25's, Malibu, Heritage and Stride).

2500058504

USA 2

(USA)

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|--|-------|-------|-------|-------|-------|-------|
| TAR & NICOTINE SEGMENTATION % | | | | | | |
| ULTRA LOW (0-6 mg. tar) | 10.2 | 10.6 | 11.2 | 11.5 | 12.0 | 12.5 |
| MEDIUM (7-15 mg. tar) | 39.9 | 39.9 | 40.1 | 43.2 | 40.5 | 41.5 |
| HIGH/FULL FLAVOR (16+ mgs.) | 44.5 | 44.4 | 44.0 | 41.0 | 44.0 | 38.5 |
| TOBACCO TYPE SEGMENTATION % | | | | | | |
| BLEND: AMERICAN BLEND | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

*ADJUSTED OFFICIAL LOW TAR MARKET SHARES

SOURCE: M.S.A. U.S. TOTAL SHARE REPORTS

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USA 3

(U.S.A.)

| | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 |
|---|------|------|------|------|------|------|
| LENGTH SEGMENTATION % | | | | | | |
| 70 MM AND SHORTER | 2.4 | 2.2 | 2.0 | 1.8 | 1.7 | 1.5 |
| 80 mm to 85 MM | 57.6 | 57.2 | 57.2 | 57.1 | 56.8 | 56.5 |
| 100 MM | 37.5 | 38.2 | 38.4 | 38.6 | 39.1 | 39.8 |
| OVER 100 MM (120's) | 2.5 | 2.4 | 2.4 | 2.5 | 2.3 | 2.2 |
| PACK COUNT SEGMENTATION % | | | | | | |
| 20 CIGTS/PACK | 97.4 | 97.6 | 98.2 | 98.6 | 98.8 | 99.1 |
| 25 CIGTS/PACK | 2.6 | 2.4 | 1.8 | 1.4 | 1.2 | 0.9 |
| PACK TYPE SEGMENTATION % | | | | | | |
| SOFT PACK | 81.3 | 80.4 | 78.5 | 76.8 | 76.4 | 74.7 |
| FLIP TOP BOX | 18.7 | 19.6 | 21.5 | 23.2 | 23.6 | 25.3 |
| CIGARETTE ADVERTISING MEDIA AVAILABILITY | | | | | | |
| *NOTATIONS: 1) YES | | | | | | |
| 2) BANNED | | | | | | |
| 3) RESTRICTED | | | | | | |
| A) TELEVISION | 2 | 2 | 2 | 2 | 2 | 2 |
| B) RADIO | 2 | 2 | 2 | 2 | 2 | 2 |
| C) NEWSPAPERS | 1 | 1 | 1 | 1 | 1 | 1 |
| D) MAGAZINES | 1 | 1 | 1 | 1 | 1 | 1 |
| E) COUPONS | 1 | 1 | 1 | 1 | 1 | 1 |
| F) POINT OF SALE | 1 | 1 | 1 | 1 | 1 | 1 |
| G) BILLBOARDS | 1 | 1 | **1 | **1 | **1 | **1 |
| H) CINEMA | 1 | 1 | 1 | 1 | ***2 | ***2 |
| I) SAMPLING | *3 | *3 | *3 | *3 | 3 | 3 |
| J) TRANSIT | - | - | - | - | - | +3 |

SOURCE: M.S.A. U.S. TOTAL SHARE REPORTS

*Banned in at least 4 markets.

**Banned in Portland, ME, Manchester, Burlington, Utah, Alaska.

***Not used based on internal policy decision.

+Banned in Boston and San Francisco

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USA 4

(U.S.A.)

1986 1987 1988 1989 1990 1991

HEALTH WARNING & T&N LISTINGS

ANSWER EITHER: YES OR NO

| | | | | | | | |
|--------------------|-----------------------|------------|------------|------------|------------|------------|------------|
| WARNING ON: | A) PACKS | YES | YES | YES | YES | YES | YES |
| | B) CARTONS | YES | YES | YES | YES | YES | YES |
| | C) ADVERTISING | YES | YES | YES | YES | YES | YES |

SPECIFIC T&N NUMBERS ON:

| | | | | | | |
|-----------------------|------------|------------|------------|------------|------------|------------|
| A) PACKS | NO | NO | NO | NO | *NO | *NO |
| B) CARTONS | NO | NO | NO | NO | *NO | *NO |
| C) ADVERTISING | YES | YES | YES | YES | YES | YES |

TAR BANDS PRINTED ON:

| | | | | | | |
|-----------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| A) PACKS | NO | NO | NO | NO | NO | NO |
| B) CARTONS | NO | NO | NO | NO | NO | NO |
| C) ADVERTISING | NO | NO | NO | NO | NO | NO |

CONSUMPTION OF OTHER TOBACCO PRODUCTS

| | | | |
|--|----------------|----------------|---------------|
| CIGARS (MILLIONS) | 2,968.1 | 2,768.4 | 2,541 |
| PIPE TOBACCO - DOMESTIC (THOUSAND LBS.) | 15,623 | 13,756 | 12,506 |
| LITTLE CIGARS | 966.6 | 453.5 | 1,166 |
| ROLL YOUR OWN (THOUSAND LBS.) | 3,386 | 3,396 | 3,871 |
| CHEWING TOBACCO (THOUSAND LBS.) | 78,794 | 76,394 | 74,691 |
| SNUFF (THOUSAND LBS.) | 46,688 | 45,093 | 47,809 |
| BIDI (MILLIONS) | N/A | N/A | N/A |
| KRETEK (MILLIONS) | 42.558 | 44,922 | 41,283 |

SOURCE: TOBACCO MERCHANTS ASSOCIATION.

***BUT ARE USED FOR SOME BRANDS.**

2500058507

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